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Lifelong Learners Study in Virginia

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Lifelong Learners Study in Virginia

A dissertation submitted in partial fulfillment of the requirements for the degree of
Doctor of Philosophy at Virginia Commonwealth University

By

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ABSTRACT

Lifelong Learners Study in Virginia

By Dianne Quinn Kurec, PhD

A dissertation submitted in partial fulfillment of the requirements for the degree of
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Virginia Commonwealth University, 2006

Dissertation Chairperson: Director, Dr. Robert D. Holsworth, Center for Public Policy

The purpose of this study is to identify the current baseline for lifelong learners (age 50 and better) focused on post-secondary education in the Commonwealth of Virginia (VA), the resulting academic services and public policy implications. While the aging research to date is overwhelmingly focused upon health issues, financial security, legislative initiatives, care-giving, and assisted living, etc., fewer studies or data are available on the increasing post-secondary continuing education that lifelong learners will likely expect to be made available to them. The educational level of the growing aging population will continue to increase. Research has repeatedly proven higher education to be a reliable predictor of continuing lifelong higher education. As proven elsewhere, lifelong learners will benefit physically from the healthy mental fitness and the learning society will benefit from the shared wealth of a lifetime of experience, talent, and community service. The very nature of the traditional withdrawn retirement is being redefined by lifelong learners in active productive retirement by those who vigorously engage in meaningful activities throughout the extended phases of their lives. Many lifelong learners continue to work full or part-time, start new careers or their own

businesses, provide volunteer services in their communities and seek post-secondary continuing education into very advanced ages. This powerful graying population is an undeniably huge market as boomers control 70% of \$7 trillion dollars total household worth. This researcher anticipated that limited adult education available beyond the legislated minimum requirements for adult basic literacy education is unevenly distributed among private and public agencies serving the aging. For the many relatively healthy adult learners whose attention and resources are not consumed by health and wealth concerns, their continuing education desires will not nearly be met by the small number of programs available to meet adult learners' growing educational needs. A study of academic services currently provided and projections for the academic services required in the future forecasts the educational service needs of the burgeoning adult learner population. This study outlines a baseline of adult learners' services, needs/desires, future plans and public policy choices that will face Virginia as the aging population rapidly grows.

CHAPTER 1

Introduction

America is poised on the brink of Tsunami waves of changes associated with the cresting of the “Baby Boomer” population bulge surging past 50 years of age. The United States Census Bureau reports that more than 76 million boomers will have half or more of their adult lives yet to spend in this demographic revolution. The purpose of this public policy study is to serve as a baseline study of current public policy for lifelong learners (age 50 or better) in post-secondary education studying in the Commonwealth of Virginia (VA), the resulting services provided and public policy implications. This study is focused upon the Lifelong Learning Institutes (LLIs) membership and limits the subjects of this study to academic providers and screens out many other training providers who feature gerontological, medical, financial, psychological, health, wealth, and welfare services. The focus of this adult learner study is adult learners’ continuing academic post-secondary education and public policy options.

While the aging research to date is overwhelmingly focused upon health issues, financial security, legislative initiatives, care-giving, and assisted living, etc., fewer studies or research data are available on the increasing post-secondary continuing education that lifelong learners will likely expect to be made available to them. The educational level of the aging population will continue to increase from about 17% in 2001 who held a bachelor’s degree or more (Profile of Older Americans: 2002, AoA,

USDHHS). Research has repeatedly proven higher education to be a reliable predictor of continuing lifelong higher education (Houle, Long, Knowles, etc.). Lifelong learners will benefit physically from healthy mental fitness and the learning society will benefit from the shared wealth of a lifetime of experience, talent, and community service. Other trends contributing to the boom in older adult education include better health at advanced ages, improved geographic mobility, and distance from extended family obligations, earlier retirement and the longer length of retirement. The very nature of the traditional withdrawn retirement is being redefined by lifelong learners as active productive retirement by those who vigorously engage in meaningful activities throughout the extended phases of their lives. Many will continue to work full or part-time, start new careers or their own businesses, provide volunteer services in their communities and seek post-secondary continuing education (usually not matriculating for degrees) into very advanced ages. This very powerful graying population is an undeniably huge market as boomers control 70% of \$7 trillion dollars total household worth (Profile of Older Americans: 2002, AoA, USDHHS).

Statement of the Problem

Over 76 million baby boomers are surging into retirement. For the many relatively healthy adult learners over 50 years of age whose attention and resources are not consumed by health and wealth concerns, their continuing education desires will not nearly be met by the small volume of programs available to meet the unique academic needs of this growing demographic. These specialized adult student seats have appeared on Virginia's campuses in just the last fifteen years and already stress the limits of the volunteer organizations that support them.

Subproblems

1. Subproblem: The lifelong learning in retirement service providers in Virginia are independent of one another and have no state or national reporting requirements for data collection. They lack a voice or champion to promote their collective interests or group identity as a coherent political self-interest group for their mutual benefits or lobbying purposes. The first objective of this study is to collectively identify existing services of the providers as an aggregated group.
2. Subproblem: The lifelong learning in retirement service providers in Virginia are struggling to meet the needs of their constituencies via independent host college and university associated volunteer-directed/operated organizations. The second objective of this study is to assess these services and needs and compare them to the current and projected populations of their service areas.

3. Subproblem: The lifelong learning in retirement service providers in Virginia potentially will need public policy support to grow to meet societal needs in a rapidly increasing demographic. The third objective of this study is to examine the public policy choices.

Statement of the Problem and Rationale for Study

The problem this researcher observes and anticipates is that older learner adult education beyond the legislated minimum requirements for adult basic literacy education is unevenly distributed among numerous state, local, private and volunteer agencies serving the aging. For the many relatively healthy adult learners whose attention and resources are not consumed by health and wealth concerns, their continuing education desires will not nearly be met by the relatively small number of programs available to meet adult learners' growing educational needs. The present distribution and capacity of resources for older adult learners will result in issues of educational access – availability of higher education opportunities to all segments of society and educational equity – balancing educational opportunities between different groups in society. This begs a public policy study for lifelong learners in Virginia today in preparation for tomorrow. A study of public policy and services currently provided and projections for the services required in the future is needed to forecast the educational service needs of the burgeoning adult learner population. This study will be limited to academic educational services provided above the secondary level of education in the Commonwealth of

Virginia and will not include gerontology and health related training provided outside of the academic interests/scope of this study. Other studies document the primary motivations for mature learners as desire for intellectual stimulation and social contact and other benefits.

Virginia's Aging Population

The Virginia Center on Aging (VCoA) at Virginia Commonwealth University has been designated three primary functions by the Virginia General Assembly: interdisciplinary study, research, and information sharing. Attendant to the mission, VCoA was empowered to conduct: continuing education and in-service training to work with elders; educational and training programs for older persons, educational activities for students in disciplines other than gerontology; research and dissemination in the field of gerontology; data collection and dissemination on elders statewide and regionally; and coordination with the Virginia Department for the Aging. The VCoA has become a “super site” designated by Elderhostel and operates sites around the state. VCoA administers grants, proposals, and funds for aging-related research work in Virginia, most notably in community-based and institutional long-term care. In October, 2004, the VCoA website reported,

“The population of Virginians age 60 and over will grow from 14.7 percent of the total population in 1990 to almost 25 percent by 2025 when there will be more than 2 million Virginians in this age group. The number of Virginians age 85 and older will increase dramatically between 1990 and 2025 – five times faster than the state’s total population growth. Virginia's older population is growing more racially and ethnically diverse, reflecting the growing racial and cultural diversity of the Commonwealth and the nation. In 1990, older women outnumbered older men in Virginia by almost 42 percent. As a result of improving survival rates and increased life expectancies for older men, by 2025 older Virginian women are expected to outnumber older men by only 18 percent.”

Virginia's retirees have already grown above average populations of age 60 and better in some locations. For example, more than 22% of the population in the suburban Williamsburg area and James City County are over age 60 with several large new retirement communities planned and being developed. The Williamsburg community infrastructure is already responding to its demographic changes with significant changes to healthcare services and relocation of the hospital facilities. Some researchers consider the graying Williamsburg area a likely harbinger of how communities will be affected as their populations age over the next few decades. The following tables and figures illustrate the changing population demographics.

Table 1 – Virginia's Demographic Trends

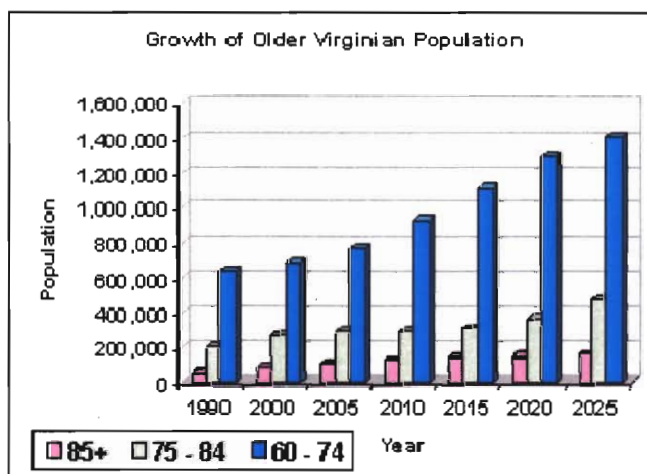


Table 1 – Virginia's Demographic Trends

Table 1, Virginia Demographic Trends (shown above) demonstrate the rapidly increasing growth of the older Virginian population which will more than double by 2025.

Figure 1 – OLDER VIRGINIAN POPULATION DENSITY

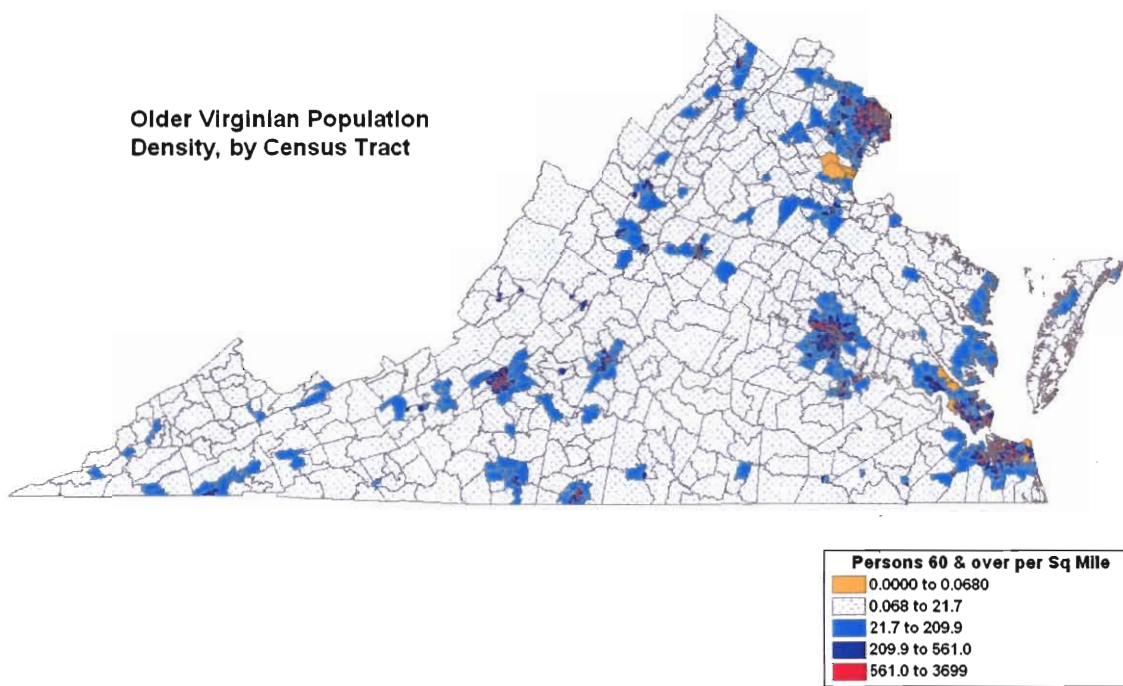


Figure 1 – OLDER VIRGINIAN POPULATION DENSITY

Figure 1, shown above, illustrates the older Virginian population density with Census 2000 data. The most densely populated areas around Washington, DC; Hampton Roads, the capital area around Richmond; and the Roanoke area have more than 500 persons over age 60 per square mile.

Among the elderly, the boomers are the wealthiest and best educated adult learner generation to date (Cornman & Kingson, 1996, p. 22). They have demonstrated intermittent life long learning to their families by doing their parental homework at the kitchen table while their children watched. We may safely presume that each succeeding generation will get higher education and the proportions of higher education in the general population and levels of higher education will continue to grow. Senge (1994, pp.141-2) called this controlled purposeful pursuit “personal mastery” and described a “discipline of personal growth and learning.” Additionally, Gibson (2000, p. 112) similarly describes a personal “map of growth” upon which we see ourselves achieving milestones towards an objective of individual success that we ourselves identify as our own self-actualization – the pinnacle of Maslow’s hierarchy of needs per humanistic gerontology.

This self-actualizing boomer population bulge has not and will not go quietly into traditional retirement. Boomers are proceeding to redefine retirement living as they have flexed their wealth and influence. Their desires for continuing higher education are revising curriculums to meet their needs. The close correlation of education as a predictor for continuing learning (Cross, 1981, p. 80) is also demonstrated statistically as “educational attainment is more closely related to educational participation than are...other variables used to describe adult learners.” The wealthy and educated boomers will do the same and more for their kids to grow their educational levels and increase the close correlation of education as a predictor of continuing higher education. Peterson (1999, pp. 18-19) describes the competition for insufficient resources as “generational

battles” among segments of society, “how will young and old live happily together if they see themselves as competitors for scarce resources?...will the aged be praised for increasing the quality of life if they are deemed responsible for bankrupting the global economy?” Moody (1988, p. 199) calls lifelong learning “a paradox: education for self-fulfillment has a powerful claim as a humanistic ideal, yet it has a weak claim on public resources.” Public educational policy has not yet sufficiently accommodated older learners as a special interest group.

The fields of gerontology, social gerontology, educational gerontology, and geriatrics studies all converge and bear some responsibility in persistent misconceptions about aging. Gutmann (1987) indicts gerontologists for “elaborating the doctrine of catastrophic aging, by portraying the aged as needy of services, and by playing down the developmental possibilities of later life.” Early aging theories of deterioration have been overcome by more recent and reliable research (Schaie and Willis, 1999) that posit intelligence and cognitive functioning remain relatively stable with age except when illness impairs intellectual performance. Medical science and technology has improved every generation. Therefore, there are larger, healthier cohorts of aging learners surging into their retirement years and into learning sites throughout Virginia. Learning occurs formally and informally in a variety of settings around the Commonwealth. Learning activities for mature citizens are found in public and private colleges, agencies on aging, churches, community centers and public and private retirement residences in various traditional and non-traditional models. Some examples follow.

Traditional Models

Public policy for adult education arises from the bloom of the adult basic education (ABE) movements originating in the 1960s and 1970s and ABE attempts to define a basic literacy minimum standard and to provide educational access for non-traditional students above age 25. From 1970 to 2000, the rate of high school diplomas and/or equivalencies grew from about 25% to more than 70% in the United States. In the Commonwealth of Virginia, the Senior Citizen's Higher Education Act of 1974, Code of Virginia 23-38.54-60, allows senior citizens to audit courses in Virginia's public colleges and universities **tuition free** with the approval of the Registrar (subject to space availability and instructor agreement) and the 2003 amendment enacted by the General Assembly of Virginia [H 1868] abolishes the eligibility limit of taxable income. This legislation costs state-supported institutions nothing. A recent canvassing of this study's primary subject colleges and universities found less than 20 senior students (statistically insignificant numbers) requested tuition free waivers to attend or audit traditional classes. This is reported in more detail later in this chapter under the subtitle, 'The Unwanted Tuition Free Offer.' This benefit is not well known and seldom used by eligible seniors.

Additionally, community colleges have a statutory obligation to meet the learning needs of its changing service population. The Virginia community colleges continue to focus upon traditional-age 17-25 year old students and employee workforce development even while those population segments are on the wane. The community colleges already

have a well-distributed infrastructure from which to provide both educational access – availability of higher education opportunities to all segments of society and educational equity – balancing educational opportunities between different groups in society. The persistent inequity is that the kinds of non-credit courses desired by older adults are not subsidized by state and/or industry sponsors making them comparatively more expensive than credit-bearing courses. Furthermore, the uneven distribution of lifelong learning opportunities among local, private, public and volunteer agencies serving Virginia's aging is illustrated in this study. Perhaps the well-distributed community college network is an existing infrastructure platform from which the growth to meet the needs of the growing golden population may be equitably served – a conclusion Malami (2001) reached in her study.

Moody (2000) summarizes key federal legislation on aging and observes that “today, more than 30% of the federal budget is spent on the elderly, and the percentage is rising each year.” The Older American Act (1965), and its subsequent amendments, has yielded a national aging network of services distributed through local Area Agencies on Aging. Moody explains the growth in spending for older Americans as distributed by age without regard to need, broadly supported, and continuing to grow. The local Area Agencies on Aging primarily serve health and welfare issues and provide information and referrals.

Manheimer (2005) observes evolving (political) rationales as, “changes in public policy regarding retirement, social and health care insurance, and other age-based entitlement programs and social policies.” The concurrent decline of the social

withdrawal and disengagement theories of aging is meanwhile yielding to the ‘activity theory’ of productive or successful aging. The political and social perspectives are not yet aligned. The mistaken theories of “catastrophic aging” have not yet faded from generalized aging expectations and continue to shape the “social service” model of older adult education titled by Moody (1985). This attempt to ‘mainstream’ older students into existing traditional models was erratic, largely unknown/under-reported, and usually inconsistently supported or unfunded. These experiments were intermittently supported and quickly faded. By the late 1980’s, Virginia’s seniors would seek to create their own volunteer models of a new educational format to meet their needs.

Volunteer Models

Lifelong learners have generated yet another alternative post-secondary educational format that reflects their own preferences by initiating adult learners' volunteer-operated programs under the auspices of sponsoring public educational institutions. The format featured in this study is the Lifelong Learning Institute (LLI) and some are endorsed by the Elderhostel Institute Network (EIN) (see appendices). There are more than 300 LLIs in the United States and about 1,000 LLIs around the world (the numbers vary almost daily with membership status). The common binding interest of members is lifelong learning. LLIs are usually staffed by part-time volunteers who are lifelong learners as members who instruct, administer the programs, and assist instructors and classmates. Notably, lifelong learners are less interested in credentials for professional or career-related vocational skills, and often do not matriculate for degrees, preferring interesting intellectual stimulation rather than additional credentials. Wilson (2000, p. 658) observed, "adult learner citizens who attend classes may seek no qualification. They learn, but their uncertificated education may not count as 'real' learning. Qualifications (credentials) provide the main console from which learning is controlled." Wilson's indictment suggests that because the EIN and LLI learning is not 'credentialled' it has not achieved the value of recognition. Credentials are not a primary objective of many adult learners' learning in the EIN and LLI environments.

Though many courses have prerequisite readings, most do not have homework, grades, or examinations. LLI courses do not usually bear credit or contribute to degree-

producing matriculation. The modified schedule is frequently a three or six week course but varies among the independently operated LLIs. Many LLIs offer two short course periods within a semester schedule to accommodate adult learners' desires for short terms and short courses to plan around their retirement travels. Classes may be conducted on campus in private or state-owned facilities of the sponsoring college or university or in local historical venues or (at the convenience of the membership) in privately-owned nursing, church or retirement facilities willing to share their space. Parking and handicap access are often primary considerations. Some LLIs offer day trips, field trips, music or theater excursions and other special events. Each LLI makes its own rules and sets the norms for its own membership. Some LLIs establish a minimum entry age and others welcome all lifelong learners. Fees are generally modest and may include other benefits extended by the sponsoring institution, for example: admission to special events, luncheon lectures, use of the institutional library and other facilities or transportation, newsletter, bookstore discounts, etc. The services and fees are not the primary motivators for the popularity of these LLIs. Much of glue that holds these volunteer operated organizations together is the fellowship of like-minded lifelong learning members whose "inquiring minds" (Houle, 1961) remain bright with curiosity polished by a lifetime of experience.

Summary

Chapter One serves as a general introduction to the problem, the rationale for the study, problem statements and research questions. Virginia's aging population and the distribution of the population's aging density across the Commonwealth is generally described in Chapter One and further detailed in the reporting of "Findings" in Chapter Four. Traditional models for senior adult education arising from very little state legislation on the subject are reported. The state 'unwanted tuition free offer' is summarized. The Volunteer Model which surged into popularity on public campuses in Virginia during the last fifteen years is outlined in limited contrast to the Traditional model and later reported in detail in Chapter Four, "Findings."

The older population is distributed throughout the Commonwealth of Virginia and has some very high aging population density sites from which to serve a rapidly growing elderly population that will likely expect (perhaps demand) that lifelong learning services be made available for them. Very little legislative attention or effort has been focused upon this need for post-secondary education which is presently being met with a small volume of volunteer models that are beginning to show the stress of rapid growth. The existing volunteer models are hosted by public colleges and universities as a part of their public service and outreach obligations to their communities. As needs exceed the capacity of volunteer organizations, concerns will evolve and changes in public policy on aging will become issues for social changes. Public policy makers will have to reconsider roles and issues of older adult education will become the topics of public

policy discussion. This study yields a comparative data baseline for launching the public policy debate to more directly and actively support lifelong learning for seniors.

CHAPTER 2

REVIEW OF THE LITERATURE

Introduction

The literature review for this study is derived from the fields of public policy, gerontology, and adult, continuing and higher education. The interdisciplinary nature of the review creates a unique lens through which to view the simple objectives to examine what is being done now to meet the educational desires of lifelong learners in Virginia and what may need to be done in the future. Relatively few research studies exist on this subject. A prolific source on lifelong learning is the University of North Carolina's College for Seniors where Manheimer and his colleagues have published repeatedly. In 1992, Fischer and others, edited a reference that precedes the most explosive growth period of learning in retirement. The literature review will include a review of public policy for adult learner education, older learner adult education policies and legislation in Virginia, data from the U.S. Bureau of the Census, the National Center for Health Statistics, federal Administration on Aging (AoA), American Association of Retired Persons (AARP), Lifelong Learning Institutes (LLIs) of Elderhostel Institute Network (EIN), Virginia Center on Aging (VCoA) at Virginia Commonwealth University (VCU), the Virginia Department on Aging, the National Information Center for Higher Education Policymaking and Analysis, and others. The researcher attended the 2003 Seniors

Exposition in Virginia Beach and the Lifelong Learning Institutes 2003 and 2005 Mid-Atlantic Conferences and met with representatives of numerous agencies both public and private that have provided information. This researcher presented preliminary findings at the first Virginia conference in 2004. The researcher continues as a member of area groups of lifelong learners. This researcher will pursue all leads for related data and will share same as published resources in the attached appendices.

Public Policy on Aging

Public policy for the aging is a reflection of citizens' rights and benefits granted by the states through public policy. These rights and benefits are delivered by a variety of public and private institutions and filtered through socio-economic, gender, racial and other barriers. Public policy theorists offer a variety of perspectives on elderly education. "How public policy defines citizens rights is highly determinative of the "life chances" available to members of society, including the elderly." (Estes, 2001, p. 11) Estes concluded, "a critical perspective on social policy and aging provides the tools to understand the broad social, economic, and political factors and structural arrangements ... a direct challenge to the dominant and mainstream thinking ...that tends to reduce aging to an individual problem of dependency." Estes (2001, p. 233) points out that social policy and aging has been largely framed by Social Security and health policy. Meanwhile, Wilson (2000, p. 644) alleges, '...social, political, and economic factors are driving the concepts for 'lifelong learners' and 'learning society in theory, practice, and policy.' It seems to this researcher, that the schizophrenic approach to public policy and administration persists as described by Waldo (1968) that "public administration has had so many identity crises that the life of the average adolescent appears idyllic in comparison. Contemporary practice of public administration remains uncertain." The erratic attention given aging learners is demonstrated by the lack of a well-known voice in the public policy arena to champion asserting their needs. The social mission of higher education in a learning society as a service to society is awakening to the realization that

this too includes those age 50 and better. Sassoon's (1991, p. 90) critical perspective emphasizes power struggles over social policy and aging of "the citizen" treated "as equals" without achieving "equality." Estes (2001, p. 234) concludes that current policy merely seeks to reproduce the same "dominant institutions of society and the unequal distribution of power and material resources, thus perpetuating increasing inequality along the lines of the preexisting social divisions in society." Rourke (1984, p. 130) writes, "In democratic societies at least, it has been traditionally assumed that public policy should reflect both the needs and the desires of citizens...that popular preferences should be reflected by political executives..."

The policy dilemma for education in later life arises around the issues of who should provide and pay for education which is not designed for career enhancement or adult basic literacy education. Debates about the appropriation of public funds and resources applied to 'special interest groups' place sponsoring institutions on the defensive about their scant budgets. Hussin (1994, p. 267) observed, '...institutions, people in society were also dragged into the vortex of the swirling cycle of national priorities; in return, they were shaped by the priorities. This counteractive action-reaction relationship was a political process which involved many interests groups...[that] had to work for the benefits of the priorities.'

In the context of the many challenges facing American public service in choosing priorities, editors Ingraham and Romzek (1994) conclude: "...the American polity needs to identify the tasks of government that are indispensable to sustaining our commitment to democratic governance...governmental change and reform must be cognizant of

democratic demands..." Public policy for provision of later life education is meager at best. In Merriam and Caffarella (1991, p. 157), they cite, "The sociological factors enter with the support and resources provided by people's referent groups and society in general, which allow them to continue to grow and develop.. For example, providing elderhostels and free tuition at higher-education institutions could be termed support resources for older adults in pursuing both specific and general areas of intellectual interest." Priorities compete for resources and rise or fall on policy and execution.

A watershed event that changed American education policy forever and continues to profoundly affect it today was the passage of the G.I. Bill of Rights in 1944. From 1945-1949, over two million veterans flooded into American colleges and universities and comprised 70% of the graduating Class of 1949 (Pittman and Osborn, 2000). These mature students changed teaching techniques for adults, disrupted the traditional patterns of education, and coincided with a surge in women's education. Additionally, the 1976 Vocational Education Act funded retraining for "displaced homemakers" who reentered the workforce after divorce, separation, or loss of a spouse. The combined effect of the growth in higher education then is reflected today in the membership of Lifelong Learning Institutes and other mature learning models. Some examples of the various models for adult learning are found in this chapter.

Manheimer (1995) credits the Older Americans Act of 1965 with the rise of the field of gerontology via federal funding. Federal policy arising from the White House Conference on Aging in 1971 soon reinforced elderly educational growth with additional federal funding support. The subsequent Older American Comprehensive Services

Amendment of 1973 created the Federal Council on Aging and the National Information and Resource Clearinghouse for the Aging which provides older adults grants for state library (never funded) and education programs, and trains people to work with the elderly. Congress never funded the Lifelong Learning Act of 1976. Manheimer (1995) credits these federal policies with the creation of community activities serving the aging. Moody (1998) called this period the “social service model” of learning to deal with the “problems” of needy old people and contributing to the image of the deteriorating elderly. Manheimer allows that social services at senior centers have evolved over time to more nearly reflect today’s elderly as healthier and better educated.

Moody (1988) reported, “Self-Sufficiency” as the theme of the Lifelong Learning and Aging miniconference by the 1981 White House Conference on Aging while federal policy trended toward personal responsibility- a persistent social attitude today. The Lifelong Learning Institutes, Learning in Retirement Institutes, Elderhostel, and other self-supporting senior learning programs have thrived without government support or controls, however, these programs serve only financially independent seniors in some areas. For the many relatively healthy adult learners whose attention and resources are not consumed by health and wealth concerns, their continuing education desires will not nearly be met by the relatively small volume of volunteer programs available to meet adult learners’ growing educational needs. The present distribution and capacity of resources for older adult learners will result in issues of educational access – availability of higher education opportunities to all segments of society and educational equity – balancing educational opportunities between different groups in society. Abraham

Maslow's 1981 White House Conference on Aging report describes a hierarchy of educational needs (cited from Feldman and Sweeney, 1989). Maslow pyramids the physiological and safety needs to be met before rising to the cognitive, aesthetic, or self-actualization levels. This pyramid together with the participant profile of healthy, educated, and middle-class adult learners further stratifies adult learner participants. Participation by lower socio-economic groups is a luxury to those meeting safety needs.

In 1993, Moody contended these examples of older adult education 'function at the periphery of higher education with little serious attention because these programs do not contribute financially to the institutions through retained earnings, overhead, or grants. They operate outside the social policy framework of society that includes health care, human services, and the network of services for the aging. The result is the perception by the general public, higher education, and even gerontologists that programs such as Elderhostel and Learning in Retirement Institutes are frills for advantaged elderly.' (reported in Martin, 2002) As Moody explains,

"In an atmosphere of fiscal constraint older adult education programs are the first items to be cut. Programs to teach pottery or philosophy to retired people look more and more like frills to legislators in a period when school budgets are defeated and funds for public higher education are cut. It becomes harder to defend the programs, no matter how successful they have proved. Tuition-free, space available courses have proved to be overwhelmingly customer-oriented, leisure-time activities, not serious investments in learning for productivity. The predictable result has been an erosion of political support for such programs at a time of broader economic crisis." (Moody, 1993, p. 224)

The North Carolina College for Creative Retirement (NCCCR) model is an example of a social-investment model that Moody believes may be the model of the future. Moody claims that unlike current approaches which he calls the "private-market

approach dominant in today's aging service network" (1993, p. 227), the social investment model does not cast the older adult as a passive consumer, but as someone capable of being a producer. (Martin, 2002) Moody (1993) calls the self-sufficient volunteer participants 'producers' of benefits for themselves, their institutions, and society. Some institutions realize direct benefits from their relationships with lifelong learners as donations, scholarships, beneficiaries of endowments and settlements bequeathed in wills. The aging cohort has a strong ethic for community service evidenced by their generous contributions and volunteerism. They frequently support their institutions with valuable service time spent in libraries, mentoring programs, community service agencies, research, etc., that can be equated to manpower and cost avoidance. These partnerships are mutually beneficial relationships. Successful aging demands meaningful and fulfilling activities.

The (Unwanted) Tuition Free Offer

One public policy for lifelong learning and education in the Commonwealth of Virginia, is the Senior Citizen's Higher Education Act of 1974, Code of Virginia 23-38.54-60, that allows senior citizens to audit courses in Virginia's public colleges and universities **tuition free** with the approval of the Registrar (subject to space availability and instructor agreement). The 2003 amendment enacted by the General Assembly of Virginia [H 1868] abolishes the eligibility limit of taxable income. This legislation costs state-supported institutions nothing. A recent canvassing of this study's primary subject colleges and universities found statistically insignificant numbers of seniors requested tuition free waivers to attend or audit traditional classes. William and Mary's registrar's office reported fewer than twenty students had ever availed themselves of this free opportunity, yet more than 1500 seniors volunteer and pay to take non-credit courses in its Christopher Wren Association for lifelong learners. Even large urban universities like Mary Washington with over 20,000 matriculants reported as few as four senior participants in tuition free undergraduate classes. Virginia Commonwealth University with about 28,000 student accounts, was hard-pressed to discreetly identify its few participants because they are reported clustered together with other 'non-revenue producing' students and reported as a single line item representing less than 1% enrollment when taken together with other miscellaneous waiver and audit accounts. These recent results are consistent with low participation rates reported in a 1991 National Center for Education Statistics (NCES) study Manheimer (1995) cites at less

than 1% senior students enrolled in over 1,000 tuition free undergraduate programs across the USA. The assumption that tuition expense was a barrier to senior enrollment is clearly incorrect. Removing the tuition barrier has not increased senior enrollment in traditional undergraduate programs. This tuition free benefit remains seldom used by eligible adult learners who participate at relatively statistically insignificant rates. Other studies on motivation to participate in the traditional format speculate that seniors are avoiding this intergenerational offer because they don't like the traditional educational format or the competition with traditional students (Manheimer, 1995). Institutions may avoid the senior special interest group by erroneously perceiving seniors as a financial drain. Motivation to participate in educational programs is the subject of other studies and not a focus area of this study.

Policymakers and educational administrators are hard pressed to defend education priorities for high earning and high tax paying careerists as opposed to 'learning for life enrichment' or 'personal growth' or 'citizenship' perhaps for a limited term of retirement employment or civic volunteerism. For the institutions, it becomes a choice to follow the money. For adult learner citizens who desire the opportunity to pursue continuing education to remain intellectually and physically active and to prevent premature loss of their faculties, it requires challenging and changing institutional policies and social attitudes about later life. In 1979, mandatory retirement was gradually eliminated by the Age Discrimination in Employment Act and its subsequent amendments. The paradigm shift in the perception of (failed or disengaged) aging was being legally codified and the perception of successful (productive) aging was growing.

The Virginia Center on Aging (VCoA) was created in 1978 by legislation approved by the Virginia General Assembly. The VCoA is partnered with the Virginia Commonwealth University (VCU) Department of Gerontology, Virginia Geriatric Center, Virginia Department for the Aging, Capital Area Agency on Aging and other aging advocacy agencies as legal representatives on aging issues before the legislature and official research and study leaders. The VCoA is also the state director of Elderhostel activities throughout the state and home of an Elderhostel 'super-site' center.

Commonwealth of Virginia legislators have shown limited interest in supporting elderly lifelong learners' continued education. In 1993, Delegate Plum championed House Joint Resolution #568 which includes the following noble ideals without funding or enforcement. 'Whereas...the multifaceted missions of Virginia's two and four-year institutions of higher education may incorporate opportunities for these membership organizations through the use of campus facilities...RESOLVED...that the State Council of Higher Education for Virginia, the Virginia Community College system, and the Commonwealth's institutions of higher education be encouraged to support the establishment of "Learning in Retirement" institutes and organizations...RESOLVED FURTHER, that the governing board of the Commonwealth's institutions of higher education be encouraged to provide lists of qualified personnel, consistent with statutory provisions and institutional policies, on their respective campuses who may be contacted by interested parties to initiate discussions on the possibility of establishing these membership-driven organizations.' This proclamation did not appear to have any substantive effect upon the schools.

A significant occasion for political action in behalf of the retirement institutions occurred in 2005 when the opportunity arose to buy the old hospital property near Harrisonburg's campus of James Madison University. Concurrently, a similar hospital real estate opportunity occurred for Williamsburg to secure an extension of the facilities for the campus of the College of William and Mary. The two schools approached the 2005 Virginia General Assembly with budget requests for the purchase of those two properties to accommodate the needs of their aging populations, expanded handicapped parking, space for the Center for Wellness in Aging, expansion of the School of Education which sponsors the retirement programs, and other collegiate purposes. The growing numbers of participants in the retirement activities was calculated into the facilities use estimates and helped the proposals to pass successfully with \$50 million in appropriations. Both schools are currently engaged in capital fundraising efforts to renovate the spaces.

Recently, some medical research (Schmiedeskamp, 2000) supports continuing mental stimulation as a contributor to physical health and well-being in older people. Fear of dependence in later life among older adults has both a physical and a mental or cognitive component. As John Rowe and Robert Kahn note in *Successful Aging*, "The greatest dread for many older adults is Alzheimer's disease...Missing eyeglasses or struggling for the right words might just irritate a younger person. But for the elderly such errors bring to mind the looming threat of Alzheimer's disease or other permanent mental disability."

The MacArthur Studies of Successful Aging, conducted by Rowe and Kahn (1998), reached several important conclusions about the causes of decline in cognitive function and ways this decline can be prevented.

(as extracted from <http://www.minesotahumanities.org/LIRN/mentalfit.htm>):

- “Genetic factors account for only about half of general mental ability in later life. There is substantial room for nongenetic, i.e., lifestyle, measures to improve mental ability.
- Education is the strongest predictor of sustained mental function. Education early in life may have a direct beneficial effect on brain circuitry. It may also set a pattern of intellectual activities which when exercised later in life serves to maintain cognitive function.
- Physical exercise and lung function enhance the function of the central nervous system, especially memory function.
- A sense of self-efficacy-the belief that one can accomplish tasks-leads to improved performance of many kinds involving cognitive function. Self-efficacy has an effect on memory and successful efforts reinforce the underlying sense of self-efficacy. On the other hand, low self-esteem reinforces resignation, lack of effort and a downward spiral of unused abilities.
- Complex environments provide a variety of stimuli, choice and opportunities that exercise and sustain mental function.
- Mental function can be significantly improved by appropriate training and practice, even among older adults who showed a clear decline in certain cognitive functions, including memory loss.
- Social support has a positive effect on mental performance in older age.”

Recent biological and psychological research has also confirmed these views. We now know that brain cells are capable of regeneration in the hippocampus-an area of the brain vitally important to laying down new memories and information. Carefully conducted studies are now providing data that point to the possibility that learning may be a recipe for prevention of disease. Paul Nussbaum, Director of the Aging Research and Education Center in Pittsburgh, PA, made the following observations in a recent presentation to the American Society on Aging:

- “Education can act as a surrogate for the important environmental influences that build brain cells.
- The direct effects of education on brain structure continue throughout life.
- Increased levels of education may alter an individual's ability to perform well on tests of cognitive function.
- Among people with dementia, those who have higher levels of education get diagnosed later, with a shorter course of the disease.”

(as extracted from <http://www.minesotahumanities.org/LIRN/mentalfit.htm>)

Research conducted at Simon Fraser University in collaboration with Century House Association from 1995 through 1998 explored the development and impact of mental fitness programs with older adults in enhancing brain function and overall wellness. Their findings support the theoretical conclusions of researchers in neuroscience and psychology. Working with one group of 18 people, ranging in age from 63 to 83 (with an average age of 71.2 years) and a second group of 25 people from 50 to 91 years (average age 75 years), researchers developed a series of all-day mental fitness workshops. Participants learned how old attitudes and beliefs about declining mental abilities restricted their options for a productive old age. They learned how to change limiting beliefs to positive beliefs that reflected their potential for growth in later life, and they learned to speak the language of limitless possibility. They learned how to get "out of the box," to think and act creatively; to appreciate diversity and differing perspectives; and to listen to each other with renewed respect. Everyone who completed the pilot program benefited—all reported dramatic increases in their level of mental fitness, many had improved memory. (Cusack, S.A., & Thompson, W.J.A. (1998, September/October). *Mental Fitness: Developing a vital aging society*. Research and development of an Older Adult Education Program in the context of a seniors centre in

Western Canada. *International Journal of Lifelong Education*.). In follow-up programs with the participants in earlier workshops, another series of mental fitness seminars was developed and conducted. The series was designed to deepen and extend understanding and practice of the seven skill components of mental fitness; to build on individual needs and interests of participants; and to take maximum advantage of opportunities to develop and promote mental fitness that arise. In a rigorous evaluation of the outcomes of the program, assessment of Mental Fitness (MF) scores showed increases in every item of the scale (with one exception) when compared to the pre-MF scores. (extracted from <http://www.minnesotahumanities.org/LIRN/mentalfit.htm>)

The 1990's are called the "Decade of the Brain" for advances in brain research. This researcher is personally following the "Nun Study" (Snowdon, 2001) in which 678 elderly nuns have agreed to be studied for long periods and donate their brains to medical research. Two elderly relatives of this researcher who are participating appear to benefit from vigorous community life and support, involvement, commitment, and lifelong learning intellectual activity that may have a direct effect on long-lived healthy brains. Rowe and Kahn (1998) findings seem to confirm these factors that appear to contribute to successful aging. The study is still in progress. Stephan, Leidheiser, and Ansello (2004, *Age in Action*) reported the mental fitness benefits, role and motivation of participants in Lifelong Learning Institutes. The medical benefits and motivation are not focus areas of this study and are more completely and ably reported elsewhere.

Another aspect of learning in retirement that will not be fully explored here is the learning occurring in other American states and overseas. The focus area of this study is

concentrated in the Commonwealth of Virginia. However, I would be remiss if I did not highlight a notable effort not reported elsewhere in this study. The Minnesota Humanities Commission (MHC) was founded in 1971 as a nonprofit organization affiliated with the National Endowment for the Humanities. Its missions include: humanities foundations for family literacy; public humanities grants, research, scholarship, and networking as affiliate of the Library of Congress; and, learning in retirement via an association of senior learning organizations and services. This researcher hopes to see the Virginia lifelong learners coalesce into such a network for their collective and mutual benefit.

Phases of Lifelong Learning

Over the last thirty years, as the image of the traditional retiree and traditional college student has also aged, new terms for the periods of one's life phases have arisen. The term "third age," has come to be known as that period of active involved retirement or personal fulfillment (variously generalized as ages 60s to 70s, also called the second middle age by Manheimer) including the period of continuing education described in this study. In France, "L'Universite des Troisieme Age," University of the Third Age (U3A), spread across Europe. The U3A (Laslett, 1991) model was also adopted in Canada. Manheimer authored many works on lifelong learning from his North Carolina Center for Creative Retirement (NCCCR) at the University of North Carolina at Asheville. NCCCR is a model interdisciplinary senior services program that Moody (1993) describes as "producers" not "consumers" of the university's resources. Thereafter, some would add a "fourth age" of decline until death (Manheimer, 1995) that is also called 'final dependence' in the British model (Laslett, 1989, p. 4).

Adult learning theory has struggled to describe its evolution. Merriam (1993) wrote, "It is doubtful that a phenomenon as complex as adult learning theory will ever be explained by a single theory, model or set of principles. Instead, we have a case of the proverbial elephant being described differently depending on who is talking and on which part of the animal is being examined. In the first half of this century, psychologists took the lead in explaining learning behavior; from the 1960's onward, adult educators began formulating their own ideas about adult learning and, in particular, about how it might differ from learning in childhood. Both of these approaches are still operative. Where

we are headed, it seems, is toward a multifaceted understanding of adult learning, reflecting the inherent richness and complexity of the phenomenon." Concurrently, parallel changes in Social Security, Medicare and Medicaid have improved the health and economic welfare of seniors and drawn them up out of the poverty levels. The societal image of a "failure model" of social withdrawal or disengagement aging has been redrawn by "Baby Boomers" into a retirement image of success and productivity. Manheimer (2005) calls these new creatures the "neo-elderly." Manheimer further asserts merging aging theories of "gerotranscendence" (self-reflection)(Tronstam, 1994), "deconstructionist" ("postmodern" ideological), and "critical gerontology/theory" by Habermas. The field of gerontology was perhaps its own worst enemy in the persistent image of the failed aging stereotype. In Manheimer (2005), he supposes, an "Older Learner's Journey to an Ageless Society" in which they think "like today's 40- and 50-year-olds and think of themselves as fundamentally the same person over time and hence, an ageless self." From this perspective, Manheimer expects boomers to reject traditional retirement images and terminologies like senior, golden, elder, etc... and become more inclusive of 'successful' adult learners of all ages or 'fragment' from current associations.

Manheimer and Moskow-McKenzie (1995) claim, "there is little in the way of national data about noncredit, lifelong learning programs for older adults." The need for research in this area is immediate and timely to capture the rapidly changing growth in senior education reported by the National Household Education Survey (1999). This is a reflection of the higher rates of college education correlate. Further encouraged by the growth of spirituality, other growing learning initiatives consistent with the aging

movement include: Faith Communities in Action, Spiritual Eldering Institutes, and the “Conscious Aging” conferences of the Omega Institute and other trends toward a growing marketplace. Manheimer (2003) predicts, “retirement communities associated with colleges and universities should experience a surge in growth.” A mix of both traditional and volunteer models has bloomed during this period of transformative learning.

Traditional Models

A primary example of a changed institutional public policy in the Commonwealth of Virginia, is the Senior Citizen's Higher Education Act of 1974, Code of Virginia 23-38.54-60, which allows senior citizens to audit courses in Virginia's public colleges and universities **tuition free** with the approval of the Registrar (subject to space availability and instructor agreement). Additionally, the 2003 amendment enacted by the General Assembly of Virginia [H 1868] abolishes the eligibility limit of taxable income. This legislation costs state-supported institutions nothing. This is an example of systematically attempting to meet the needs of the older adult learners by offering them the existing traditional models. This benefit is not well known and remains seldom used by eligible adult learners. Empty classroom seats that could be filled by willing lifelong learners are among society's missed opportunities and the youthful students are deprived of the lifetime wealth of experience lifelong learners generously share.

An example of the need for an attitudinal change partly explains some reasons why the public policy for tuition free attendance didn't flourish. In response to the 1971 White House Conference on Aging and the 1973 amendments to the Older Americans Act, senior centers and community colleges offered recreational education (health, wealth and welfare courses). Those programs were extensions of existing traditional education models and were intermittently executed by a variety of grants and foundations with little institutional infrastructure support. The community colleges remained focused upon their workforce development programs while they served industry demands. They attempted

to mainstream seniors without meeting their special needs, different learning styles, and different desires and objectives. In some cases, the inconsistent availability (due to grants/funds starts/stops) failed to develop a returning senior customer support base that eventually dissipated. The complexities of participation motivation are more thoroughly studied and modeled in other adult education research and that is not a focus area of this study. Trachtenberg (1997) and Malami (2001) suggest the community colleges may be strategically poised to respond to boomers' lifelong learning needs as the workplace population moderates and the retiree population booms. There seems to remain an underserved population of lifelong learners who desire the arts and humanities for active and reflective studies they now have time to pursue to their own satisfaction. Jarvis (2001, p. 83) contends, "a large retired and active population indicates that there is a great deal of under-used social capital in society." Sinnott (1994, p. 463) proposes that future universities organize around cross disciplinary "problem focus" areas considered in general systems theory terms. Research could be globally electronically distributed yet integrated. Such restructured universities could readily adapt to rapidly changing focus areas and capitalize on the depth of experience and valuable reflections of mature learners.

Volunteer Models

Lifelong learners want to study desired subjects on their own terms. Since 1988, thirteen new Lifelong Learning Institutes (LLIs) (see terms under references and the thirteen LLIs listed in Appendix B) for learning in retirement have been established in Virginia associated with hosting colleges and universities. These independently operated programs reflect adult learners' desires in subject matter rigor, schedules, self-direction and self-administration. Lifelong learners as self-directed learners are so committed to these endeavors that nearly all the Lifelong Learning Institutes are self-supported by volunteers and member fees. Lifelong learners are self-empowered by decision-making authority for curriculum design and organizational leadership. Self-directed learning is described by some as an orderly, planned and linear process (Tough, 1967; Knowles, 1975). While Long (1988, pp. 1-2) describes self-directed learning as "weakly conceptualized, ill-defined, inadequately studied and tentatively comprehended" others attach more value to self-directed learning. Houle seems to more aptly describe many of the vigorous self-directed learners met in LLIs. Houle (1961) exhorts every era and style of learning has produced keenly 'inquiring minds.' LLIs are a magnet for the type of 'conspicuous' learners with 'inquiring minds' who eagerly "seek the rewards of knowledge for its own sake-and do so to a marked degree."(Houle, 1961, p. 3)

Examples of Other Models

In Spring 2004, another model manifested itself in this area of older adult education in Virginia. A privately financed/private school-sponsored model has been initiated at the private University of Richmond (UR) in the School of Continuing Studies called the Osher Lifelong Learning Institute. The University of Richmond is establishing the LLI with a \$100,000 grant from the Bernard Osher Foundation of San Francisco. The philanthropist, Bernard Osher, has committed one million dollars to the development of lifelong learning organizations throughout the United States. More than 76 of 100 grants of \$100,000.00 each have already been awarded. In this case, UR, the host university, provides the facilities and one paid full-time staffer while the grant will fund a part-time staffer. The LLI is a tax exempt element of the university organization. This model offers courses for personal enrichment and professional development in three terms of six to eight week courses during the fall, winter, and spring. Courses are derived from the multidisciplinary core humanities course and visual and performing arts programming. Elderhostel affiliation has not been sought at this time for the current thirty course offerings. Participants are called members at \$150 per term or \$400 for all three terms per annum and member benefits include audits of regular undergraduate offerings on a space-available basis; lunch discussions, field trips, lectures, backstage tours and meetings with visiting lecturers; access to University libraries and dining facilities; and discounts for campus events and performances. "We believe that the University of Richmond will become a national model for the successful interaction of a university

with the active senior citizens in its community,” said President Bill Cooper. “Having this constituency on our campus will enrich the educational environment for our undergraduate students, as they participate together in intellectual pursuits through our core humanities course and engage in community service activities.” (George Mason University’s Learning in Retirement Institute in Fairfax also was recently awarded a \$100,000 grant from the Bernard Osher Foundation of San Francisco [noted above] for its growing membership. Osher grants require an “invitation” to apply. George Mason University sponsors two sites, one off the main campus in Fairfax, and another site in Arlington, Virginia.)

In September of 2004, the University of Richmond also dedicated the Bonner Center for Civic Engagement to bring together campus and community leaders to address social issues in Richmond and beyond. “The center brings together academically grounded and social issues in Richmond,” explained Dr. Douglas Hicks, center director. “In addition, to helping to coordinate the 100,000 hours of service that University of Richmond students already perform in the community, we are supporting course work and research that will provide community leaders with insights into solutions to the problems we face, poverty, educational equality, access to health care and the like.” “Through collaborative study, reflection and research, students will look at the root causes of these issues and will become a point of contact for local agencies struggling with the same challenges.” (as reported in the Richmond Times-Dispatch, Oct. 10, 2004)

In Spring 2004, the new Lifelong Learning Institute (LLI) in Chesterfield held its first classes in a former Chesterfield County Elementary School. The LLI in

Chesterfield has met the requirements for Elderhostel Institute Network (EIN) membership and the LLI is pursuing nonprofit status. The LLI in Chesterfield is a joint effort sponsored by the Brandermill Woods Foundation, the Virginia Center on Aging at Virginia Commonwealth University, and the Brandermill Woods Retirement Community. The Chesterfield County government donated \$20,000 to the renovation of the old school building and county employees actively participate on the steering committee and advertise the daytime classes of the LLI in Chesterfield in county brochures with the nighttime county-sponsored classes. This cooperative venture helps to meet community needs and limitations to mobility/transportation for day and night students and keeps the building humming with activity around the clock. The Rotary Club also helped to refurbish the building and provided two scholarships for LLI participants. The private foundation, Brandermill Woods, provides a full-time director and a part-time administrator while all other staffing needs are met by willing community volunteers. The local campus of John Tyler Community college has provided computer classrooms and some classes meet in the Brandermill Church. At this writing, the fledgling LLI in Chesterfield already has about 100 annual members at \$150 per person for a full year of as many courses as desired. The annual program includes fall and spring sessions of four to eight weekly meetings of up to two hours each and a four week summer session. The lively schedule offers about 25 courses per session. In addition to the partners cited above, financial contributors include Wachovia Bank, Design Source, Midlothian Rotary Club, Brandermill Rotary Club, Chester Rotary Club, South Richmond Rotary Club, Brandermill Woods Retirement Community Women's Club, Sycamore Women's Club,

and more community partners are joining the effort. The LLI in Chesterfield is planning an ambitious schedule of social events, field trips and extracurricular activities to expand membership.

Since 1998, Virginia Commonwealth University has supported another type of lifelong learning organization under the Division of University Outreach. "The Commonwealth Society" offers 10-20 courses per semester which meet about five times per session at \$25.00 per member. The college-level courses are adult learning opportunities without papers, exams, or grades. The Commonwealth Society is not a part of the Elderhostel Institute Network for membership status.

An example of a model not affiliated with a state college or university is the Open University of the Shepherd's Center of Richmond. The Shepherd's Center was incorporated in March, 1984 as an outreach service organization of an Episcopal church. This volunteer-run faith-based organization provides socialization and education services in the Fan neighborhood of the urban Richmond community and is located close to Virginia Commonwealth University. The Open University conducts three sessions of eight weeks each at churches in three areas of the city. Member dues of \$25.00 per year and tuition of \$25.00 per Open University term for members and \$45.00 for non-members and contributions represent only two-thirds of the Shepherd's Center's financial support and the remainder comes from area congregations, corporations, and foundations. Some lectures are co-sponsored by the Virginia Historical Society. The center is one of 75 centers in 20 states with a national organization which claims to serve some 50,000 older persons nationally each year. Other personal services include transportation for

medical, dental, grocery shopping; phone friends; and administrative assistance with tax, insurance, medical, financial, legal documentation; and minor home repairs. The Center also conducts a schedule of one-day trips and contracts extended travel.

Additionally, in Virginia, the unique Blacksburg Electronic Village, or BEV, is one of the nation's oldest community e-networks. It was developed and has evolved in response to the needs of the community it serves. One of the primary goals of the Blacksburg Electronic Village project is to evaluate and document the use and impact of community networking. Moreover, the project seeks to help foster research in collaboration with other faculty and students interested in the social, educative, political, economic and technical aspects of networking. This project is conducted in selected rural communities of Virginia.

Other programs across the United States include May Company department stores' Older Adult Service and Information Centers (called OASIS institutes) which focus on education in the arts and humanities. SeniorNet is an older computer user support group on-line with about 100 service centers across the country. The American Society on Aging has a Lifetime Education and Renewal Network (LEARN). The Association for Continuing Higher Education (ACHE) has an older adults division. The Association for Gerontology in Higher Education (AGHE) includes some education for seniors. The links for these programs are given in the references at the end of this study.

Toward Public Models?

Justification for public institutional support of older adults' continuing educational access is consistent with the educational purposes of public policy to provide equal access to an informed citizenry. A. Kenneth Pye (1995, eds., DeNeef and Goodwin, p. 298) asserts, "University governance today is a process in which trustees, administrators, faculty, students, and sometimes others, share responsibility for making important decisions required for an institution to perform its missions of teaching, research, and public service. The crucial issues are who participates at what times in what decisions in what ways." Public universities have collateral duties for community service and the lifelong learners represent not only the highest percentage of voters by age group but also a wealthy and growing segment of the population with increasing influence. Ultimately, decisions about what learning opportunities are offered are influenced by those who pay and those who pay exert the power to determine what is good for the rest of the learning society.

What is 'good' for the learning society? In joining politics and public policy, Immanuel Kant, the foremost thinker-philosopher of the Enlightenment, idealized universal morality that is operationalized as the "public interest." A learning society is thought to be good for the public interest. The public interest is actualized by political and public policy activities. Frank Fischer (1995, p. 156) describes political science as "the discipline designed not only to examine empirically, the political structures and operations of power that govern our common life, but also to normatively evaluate the

progress of the search for the “good society.” Aristotle defined political science as “master science” fueling an ideological philosophy. John Rawls (1971, p. 302) published principles of justice, equal rights, greatest expected benefits, and fair opportunity are foundational to policy sciences. Together, it would seem that politics and public policy would fairly serve the public interest in providing for the “good society” by publicly supporting lifelong learning for all ages – would but that it be so simple.

Nothing is simple. Complexity within the public sector and between the public and private sectors complicates the search for the “good society.” Public educational programs are being provided by private organizations in a complex arrangement of private providers of academic services in response to public needs for services. In this case, adult learners’ continuing academic education is being provided by privately organized volunteer groups, Lifelong Learning Institutes (LLIs), associated with private and publicly operated universities and voluntarily subscribed to a national private organization, Elderhostel Institute Network (EIN). Peters, (1995, p. 343) points out that this is ‘government once removed’ whereby the accountability is diffused through layers of administration both public and private. The alert triggered here arises from the observation that access to these services may not be universally available equally to all lifelong learners who desire to participate – an issue of enforcement of fair opportunity usually monitored by the government. Peters summarizes, “...that administration is not the “mere application of the law” but rather a vital component of the governmental process with a tremendous - and often untapped - potential for assisting in the creation of a better economy and society.” In “The Politics of Problem Definition: Shaping the

Policy Agenda,” Rochefort and Cobb (1994, p. 25) identified “an essential concern in problem definition is solution availability.” Lifelong learners were unable to find the desired services and created their own solution. The adult learner citizenry has chosen to generate a service provider in the absence of a governmental service provider that met their unique needs. In “Reinventing Government,” Osborne and Gaebler (1992, p.168) indicted the traditional (governmental) educational systems as “brand X” education provided by a government that failed to be customer-driven. Peters (1995, p.333) asks, “How do we reconcile the customer first approach of reinvention with the citizen sovereignty that forms the basis of our republic?” in “The Challenges Facing American Public Service.” This researcher suggests that the growing burden on the volunteer organizations will produce demand for a public policy to support lifelong learning for all ages.

Summary

Only a few examples of other models for lifelong learning are cited here for information and contrast to the primary study subjects. There are many and varied senior service centers throughout the Commonwealth of Virginia offering senior adult education together with the provision of social services, meals, etc., some are listed in the appendices. Other sources of services include public and private colleges, universities and their alumni activities; senior centers; federal, state, regional, county, and municipal agencies for the aging; hospitals; retirement/recreation centers; investment companies/banks; museums; and a vast array on-line via the Internet. This research does not seek to identify them all. The focus of this study is limited to the purposeful subjects identified as providers of academic college-level nontraditional lifelong learning volunteer models detailed in the research findings in Chapter Four. This intentionally limits this study to academic learning versus health and wealth training.

The literature selected for review reflects the interdisciplinary nature of the fields of public policy, gerontology, and adult, continuing and higher education as inextricably entwined. The purpose of this study is to serve as a baseline public policy study of lifelong learners (age 50 or better) in post-secondary education studying in the Commonwealth of Virginia (VA) and the resulting academic study services provided.

This study assembled the naturally occurring data arising from the pursuit of preferred academic offerings in private and public sources. The mature adult education seemed to array itself in perhaps three models this researcher chooses to call the

Traditional Model, the Volunteer Model, and suggests a possible future for a Public Model. There are relatively few known research publications today about older adult learner education (age 50 or better) in post-secondary education studying in the Commonwealth of Virginia in institutional settings. Few researchers have investigated older adult education even from the medical benefits perspective or cognitive reasoning measurement. AARP has some research data regarding the use of older adult education as a growth industry or marketing tool. Older adult learners as an aggregated group lack a strong recognizable voice and representative image as a political interest group. Affluent well-educated and politically influential retirees will likely continue to dominate the Lifelong Learning Institutes (LLIs). This study contributes to the literature for older adult continuing academic education and public policy. The lifelong learning in retirement providers in Virginia potentially will need public policy support to grow to meet societal needs in a rapidly increasing demographic. This study creates a data baseline of services and needs and compares them to the current and projected populations of their service areas.

Chapter Three describes the data collection effort.

CHAPTER 3

METHODOLOGY

Primary Research Question

The primary research question is: **Are Lifelong Learning Institutions (LLIs) meeting needs in Virginia?** The “Lifelong Learners Study in Virginia” proposes to identify the existing lifelong learning in retirement institutes and services in Virginia, to assess whether these services meet current demands and future growth needs, and to examine the public policy choices. These issues will be studied in their natural settings, the real-world campus contexts where the services are provided – and no experimental conditions will be artificially imposed. The information from the Lifelong Learning Institutes in Virginia will be compared and arrayed/illustrated with Census 2000 demographic data.

Subsidiary Research Questions

Related research questions include the following:

1. What aging population density influences Lifelong Learning Institutes in Virginia?
2. What is the aging population within ten and twenty mile service area bands of the current service providers?
3. What public policy options/support may be needed for lifelong learning?

Limitations

The study was limited to Lifelong Learning Institute service providers in Virginia above the post-secondary educational level.

This study was limited to **academic** providers and screens out many other training providers who feature gerontological, medical, financial, psychological, health, wealth, and welfare services.

This study was limited to the learning society's general benefits of a well-educated citizenry and not the physical benefits of healthy mental fitness which are the subject of other medical studies.

Assumptions

1. The first assumption is that the need for Lifelong Learning Institute providers in Virginia will continue.
2. The second assumption is that the need for Lifelong Learning Institutes in Virginia will grow with the population projections of their service areas.
3. The third assumption is that the Lifelong Learning Institute providers in Virginia may need public policy support to grow to meet societal needs in a rapidly increasing demographic.

The Importance of the Study

This study collected data on the Lifelong Learning Institutes which currently exist and compare them as a coherent group. These institutes struggle to serve senior students today via independent, self-directed and volunteer-supported associations. The target senior population in Virginia will more than double in the next twenty years and create a heavy burden on these volunteer organizations, raising the issue of the potential for public policy support. A study of public policy for older learner education, legislation and services within the Commonwealth of Virginia will inform political discussion and the decision makers and may influence the shaping of policies and programs and their impact upon society. It also may suggest a pattern for an effective collective strategy for equitably serving the growing population of lifelong learners.. This study is primarily shaped by multidisciplinary studies in the departments of public policy, gerontology, adult, continuing and higher education. This researcher collected data on the Virginia Lifelong Learning Institutes (LLIs) from their organizations or administrations and other information or training resources. Additional data sources are university libraries and their electronic search engines and data bases. The data includes host institutions, services, costs/fees, volume, facilitators, fundraising, etc. (Data collection form “LLI Questionnaire” follows and is attached at Appendix A.) The comparison of the volume of services currently available and the projected growth and service needs of the adult learner population is provided as a planning tool for policymakers. This dissertation also includes appendices listing references, other works,

agencies serving the aging, and sites for adult learning that may be useful as a published resource since this information is not now readily available from a single source.

Study Design

The study design is a simple qualitative inductive inquiry well - suited to questions for which there is no one right answer known. Merriam (1989) recommends this design for exploration and examination without predetermined hypotheses. There are no hypotheses to test and no experiments to conduct. The data is found as it naturally occurs. The thirteen purposeful sample subjects (1995, Isaac, p. 223) of this study, the Lifelong Learning Institutes in Virginia, were all recently organized since 1988.

The researcher's intent was to learn more about the problem that older learner continuing education desires will not nearly be met by the small volume of programs available to meet growing needs. The study is limited to lifelong learning above the secondary level of education. These limitations of the study sample exclude training providers of health and welfare services and retain the focus on academic post-secondary education.

Data Collection

The data collection effort began before the LLI 2003 Mid-Atlantic Regional Conference and continued during and after the Conference, October 19-21, 2003. The information of interest to the LLIs was identified by the conference co-host, Old Dominion University Institute for Learning in Retirement (ODU-ILR) that initiated the inquiry. The collective data constitutes a baseline of observations of lifelong learners enrolled in LLIs in Virginia.

The data collection questions include the following.

- Where are the LLIs in Virginia?
- Who are LLI hosts?
- When were the LLIs established?
- What are the LLI relationships/support agreements with their hosts?
- How are the LLIs staffed/paid?
- How many members participate in each LLI?
- How many semesters/courses are offered in each LLI?
- What tuition/membership fees are charged?
- Who teaches and how are they compensated?
- What fundraising might be done or field trips offered?

During the course of data collection, the researcher determined additional questions needed to be added to determine how many institutes had self-determined their own maximum capacity (a maximum capacity phenomena section follows) and

established procedures for maintaining a waiting list for applicants seeking admission to LLIs. The capping of enrollment in LLIs in the United States was cited as early as 1978 by Hirsch. Hirsch also discussed admission interviews by membership committees.

This study's committee chair additionally requested that supporting data about the use of the newly legislated Senior Citizens' waiver of Tuition be included. A follow-up canvass was recently conducted by the researcher to secure this additional data. The findings are reported in Chapter Four.

The 'Cap' Phenomena

After the LLI 2003 Mid-Atlantic Regional conference, it became apparent that another area of questioning should be added to the data collection effort: has the LLI established a maximum membership capacity (cap), a waiting list and/or procedures for admission from the waiting list. The cap phenomenon uncovered at the conference was that some participating LLI locations had exceeded their self-determined capacity (cap) to meet member service demands and established waiting lists (some over 600 applicants long and waiting 3 years or more) before admission to LLI program participation. Some had devised methods for leaping to the front of the line by offering to teach a class or provide other program favors. Data gathered is intended to provide insight into the current situation, inform political discourse and public policy interests, and establish a comparative baseline for planners to meet future needs. The data was given willingly by the volunteer program coordinators without reservations. The researcher shared the data with the LLI program coordinators when completed.

The study represents the current baseline of services to lifelong learners (usually age 50 and better) in post-secondary education in the Lifelong Learning Institutes (LLIs) and other facilities for seniors studying in the Commonwealth of Virginia. The sample was limited to ensure academic curriculum rigor and exclude other non-academic training sites. The limited participation in this study does not represent all adult learner post-secondary academic activity in Virginia.

The data collection questions are an outgrowth of the research and preparations made by the Old Dominion University Institute for Learning in Retirement (ODU-ILR) that co-hosted the regional conference with the Lifelong Learning Society of Christopher Newport University, for the regional Lifelong Learning Institute (LLI) 2003 Mid-Atlantic Conference at Virginia Beach, Virginia, held October 19-21, 2003. Though described as a Mid-Atlantic regional conference, it was not limited to Mid-Atlantic members, thanks to interest from LLIs from around the country. The national Elderhostel International Network (EIN) LLI conference was held in 1999. No plans for another national EIN conference are presently known. In 2002, EIN dropped its membership fees and became a 'virtual' organization loosely connected by the Internet. The Mid-Atlantic area membership dominated conference attendance by over 150 participants but other regions participated willingly at their own expense. Attendees from outside the Mid-Atlantic regions notably included Alabama, Arizona, Florida, Illinois, Maine, Massachusetts, and Tennessee. The attendees also included civil service employees who were representatives from the Arizona State Library system, who were in the process of establishing LLIs related to their branch libraries, because their state university system had not responded to the need. LLI members and administrators are eager to learn about each other. The preliminary data collection effort by ODU-ILR produced about 24 data sets from the larger sample of conference attendees and this researcher subsequently pursued the missing data from the Virginia LLIs.

This data collection effort was based on the research questions from the LLI questionnaire (cited at the end of this chapter and at Appendix A) that was developed by

the co-host for the regional conference, Old Dominion University Institute for Learning in Retirement. This data collection constitutes a baseline of observations of lifelong learners enrolled in Lifelong Learning Institutes (LLIs) in the Commonwealth of Virginia.

Data Reporting

The data collected has been reported in Chapter Four with answers to the primary and subsidiary research questions. The data was compared and arrayed with Census 2000 population displays and statistics compiled and provided by Kevin Byrnes, demographer for the Virginia Department of Aging. Each Lifelong Learning Institute was graphically depicted in its geographic area with its aging population density illustrated in ten and twenty miles service area bands of the current service providers.

Summary

The importance of the study was to demonstrate a research void and help to fill the void by providing a baseline of current services, inform political discussion and the decision makers and may influence the shaping of policies and programs and their impact upon the future of adult education and society. The study design is simple qualitative inductive inquiry. The data collection constitutes a baseline of LLIs in Virginia. The capacity phenomena is an indicator of stress on the location.

The primary research question was: Are Lifelong Learning Institutions meeting needs in Virginia? The subsidiary research questions follow: What aging population density influences LLIs in Virginia? What is the aging population within ten and twenty mile service area bands of the current service providers? What public policy support may be needed for lifelong learning? The study is limited to **academic** providers. The researcher presumes LLIs in Virginia will continue and grow in size.

The “LLI Questionnaire” data collection instrument follows.

LLI Questionnaire

Full Name and commonly used (abbreviation)

Host college or university

Year established

Are you incorporated (Y/N)

501(c)(3) (Y/N)

Do you have a written agreement with host (Y/N)

Do you have liability insurance (Y/N)

Does your host provide services/overhead (Y/N)

Types

Do they charge you for these services (Y/N)

Explain (if need)

Is your office staffed by (volunteers/paid employees/both)

Do you meet on campus (Y/N)

If not where

Do you provide scholarships to your host (Y/N)

Other ways you provide support to your host

Number of members (full) (assoc.)

Number of semesters/programs per year

How long are your semesters/programs (weeks)

Is each semester divided (Y/N) How

Do you meet in the summer (Y/N) _____

How long is the session

How many courses do you offer in the summer

(Continued)

LLI Questionnaire (cont.)

Fees:

Membership Fee: Full Year Fall Only Spring Only Summer Only

Membership Categories:

Full Member \$_____ \$_____ \$_____ \$_____

Associate Member \$_____ \$_____ \$_____ \$_____

If form is not applicable explain:

Is there a separate charge for classes (Y/N) If so how much? (average if not constant)\$_____

Please Explain:

Who facilitates your classes ? (circle the applicable)

Volunteer members Outside experts Current faculty Retired Faculty

Do you pay facilitators (Y/N) If so how much ? If not, how do you compensate or thank them ?

Do you engage in any fundraising on your own or through your host ? (Y/N)
Examples

Do you offer any one day field trips (Y/N) _____

Do you offer any multi-day field trips (Y/N) _____

Additional questions added after discovery of the surprise phenomena of
maximum capacity ('max cap') established in some LLIs:

Do you maintain a waiting list of applicants?

How many? How long do they wait to be admitted?

Figure 2 - Lifelong Learning Institutes

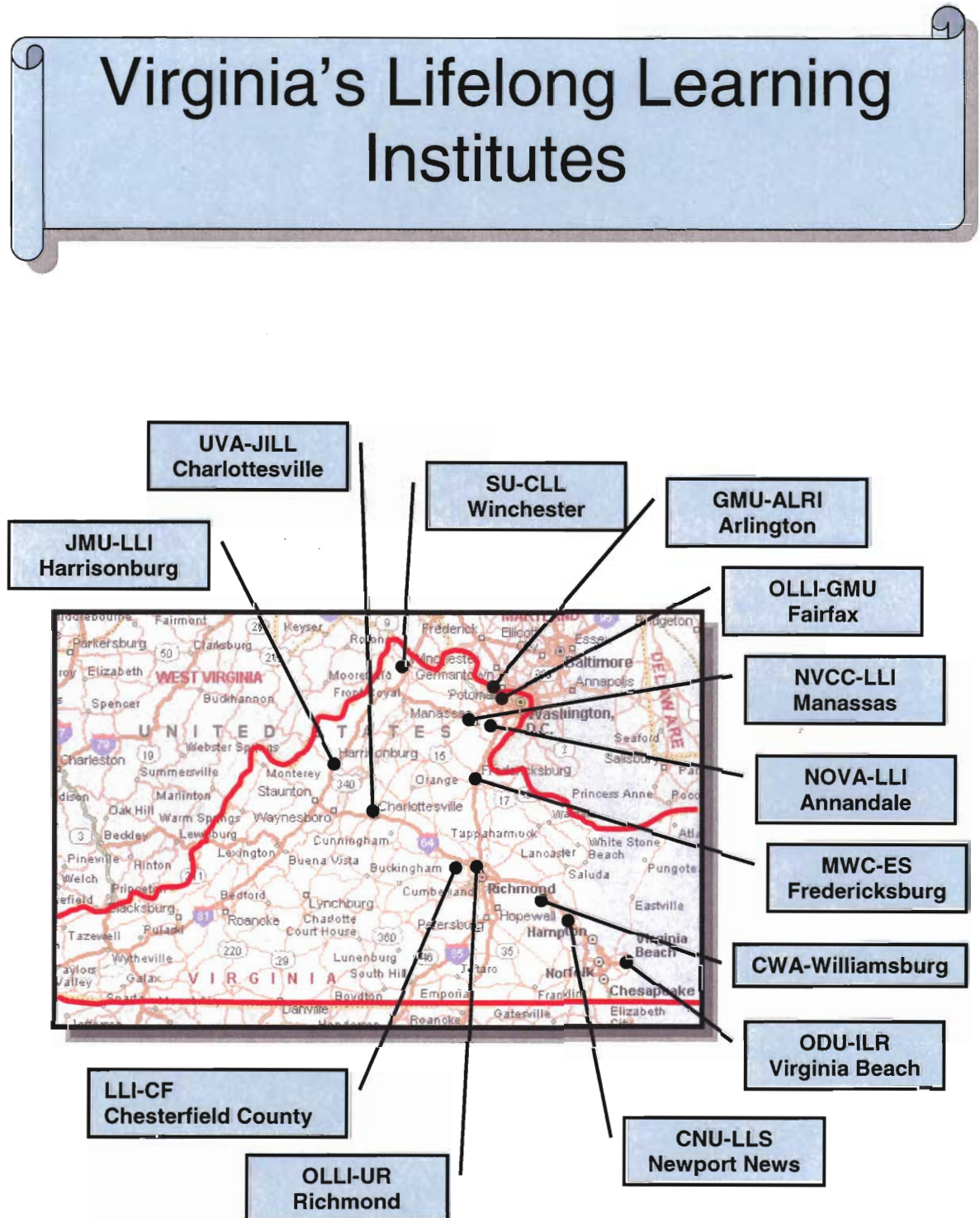


Figure 2 - Lifelong Learning Institutes

CHAPTER 4

Findings

"Learn as if you were going to live forever. Live as if you were going to die tomorrow." (Mahatma Gandhi)

This chapter describes the data collected on the purposeful sample subjects during the administration of the Lifelong Learning Institutes (LLI) Questionnaire found at Appendix A. Some of the data was gathered in response to the initial solicitation by the Old Dominion University Institute for Learning in Retirement (ODU-ILR) in preparation for the October 2003 Mid-Atlantic Regional Conference and the remainder collected by this researcher in an effort to complete the data set of all the LLIs in Virginia. Additional population data was generated by the demographic researcher Kevin Byrnes, of the Virginia Department on Aging, using the Census 2000 database. The first illustration that follows (Figure 2) is a graphic illustration of the purposeful study subjects, Virginia's Lifelong Learning Institutes (LLIs). Insufficient data is available on the new LLI being initiated at Hampton University in 2005 to report here. Notably, these LLIs are all affiliated with colleges and universities in high population density areas clustered along interstate routes I-64, I-95, and I-81 in the Commonwealth of Virginia.

Figure 2 (below) depicts Virginia's Lifelong Learning Institutes arrayed upon the map of Virginia.

Population and Distribution Data

The following data displays the population density around the Lifelong Learning Institutes' (LLIs) market areas. The market radius is calculated for square miles within increasing radii of ten miles and twenty miles from the thirteen sponsoring colleges and universities. Insufficient data is available to report here on the new LLI being initiated at Hampton University in 2005. The total estimated population in the market areas is estimated at each 0-10 miles and 10-20 miles increments and illustrated on the Virginia maps that follow as targets, with the LLI at each center of concentric rings. The target areas are further detailed into statistical displays with ten year age intervals, with totals.

Notably, the two largest populations arising around the George Mason University market area have already developed two university-sponsored LLI sites, one at Arlington (ALRI) and one at Fairfax (OLLI-GMU). The Fairfax location was recently awarded a \$100,000 grant from the Osher Foundation of San Francisco, CA. These two thriving sites continue to grow vigorously and have discussed a self-determined capacity limit.

The third largest population area served by the Northern Virginia Community Colleges has also sponsored two locations at Annandale (NOVA-LLI) and Manassas (NVCC-LLI). The fourth largest in absolute size and density ranking is Old Dominion University (ODU-ILR) which continues to grow to meet its market demand. The fifth largest area near Richmond has seen two new LLIs open in 2004: the Osher Lifelong Learning Institute at the University of Richmond (OLLI-UR) is affiliated with Osher rather than Elderhostel; and the Lifelong Learning Institute in Chesterfield (LLI-CF)

which operates within the Elderhostel Institute Network. LLI-CF is a collaborative effort of the Brandermill Woods Foundation and the Virginia Center on Aging at Virginia Commonwealth University. The LLI in Chesterfield received financial support from the Chesterfield County Public Schools, Wachovia Bank, and local Rotary and civic clubs.

The average percentage of the population over age 60 varies across the distribution, from just under 10% in the dense northern Virginia community college area to over 18% in the Harrisonburg area of James Madison University. The average across all the Virginia LLI markets hovers around 12%. The population density index maps seem to suggest that the Roanoke, Lynchburg, and Martinsville metropolitan areas could all support local learning centers.

The state maps which follow illustrate the senior population density indices around the thirteen Virginia Lifelong Learning Institutes as they lay in their respective market areas. The dot central to each set of circles is the location of the LLI as it is surrounded by ten and twenty mile radii of market bands. The supporting data is illustrated at tables which follow. The data arises from the Census 2000 statistics, compiled by Kevin Byrnes, Virginia Department on Aging.

Figure 3 – Lifelong Learning Institutes 10-20 mile Market Areas in Virginia

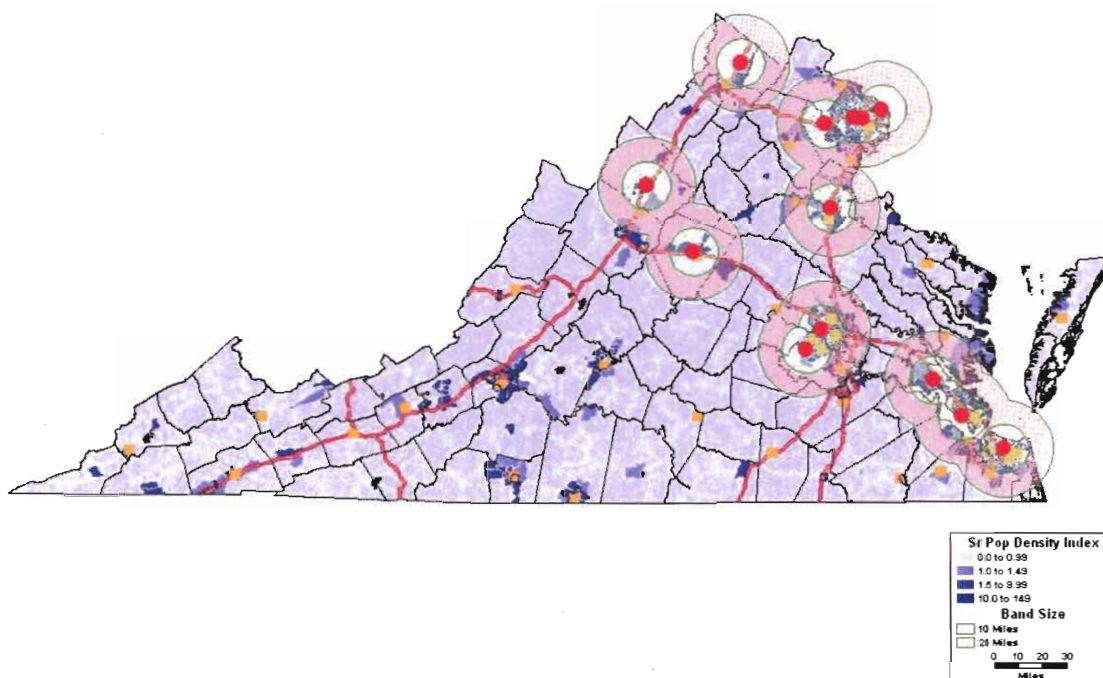
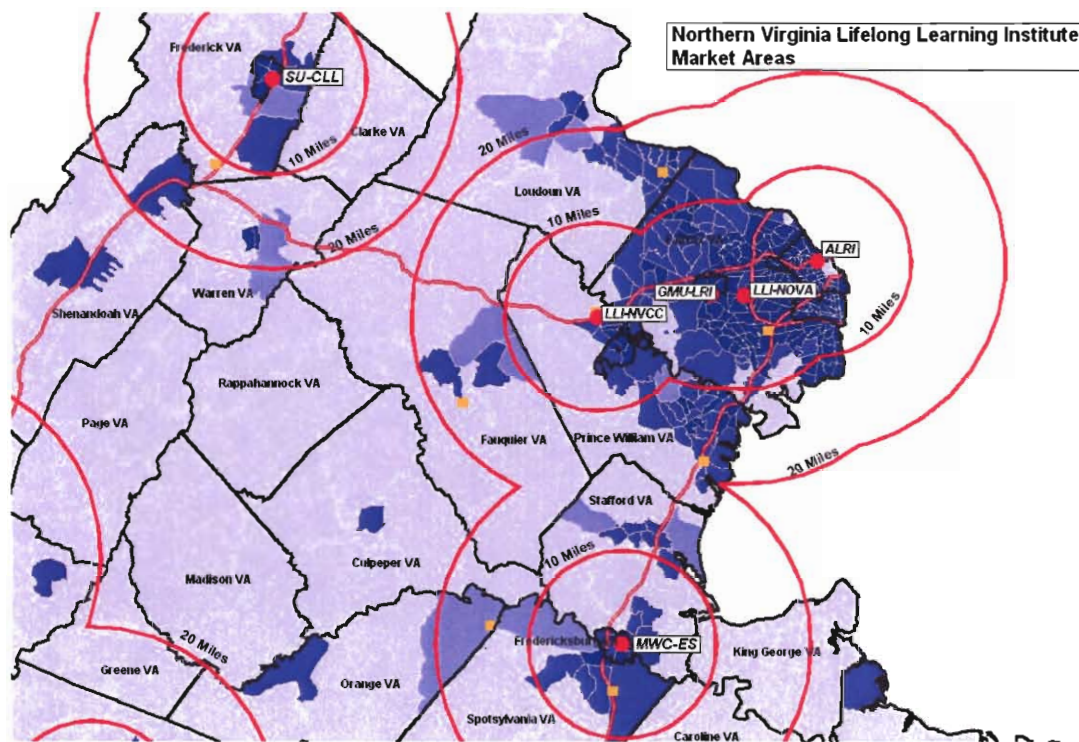


Figure 3 – Lifelong Learning Institutes 10-20 mile Market Areas in Virginia

The data displayed above (Figure 3) illustrates the population density around the Lifelong Learning Institutes' market areas. The market radius is calculated for square miles within increasing radii at ten miles and twenty miles from the thirteen sponsoring colleges and universities. The total estimated population in the market areas is estimated at each 0-10 miles and 10-20 miles increments and illustrated in detail on the Virginia maps that follow as targets with the LLI at each center of concentric rings. The target areas are further detailed into statistical table displays with age intervals with totals which follow these maps.

Figure 4 - Northern Virginia Lifelong Learning Institute Market Areas

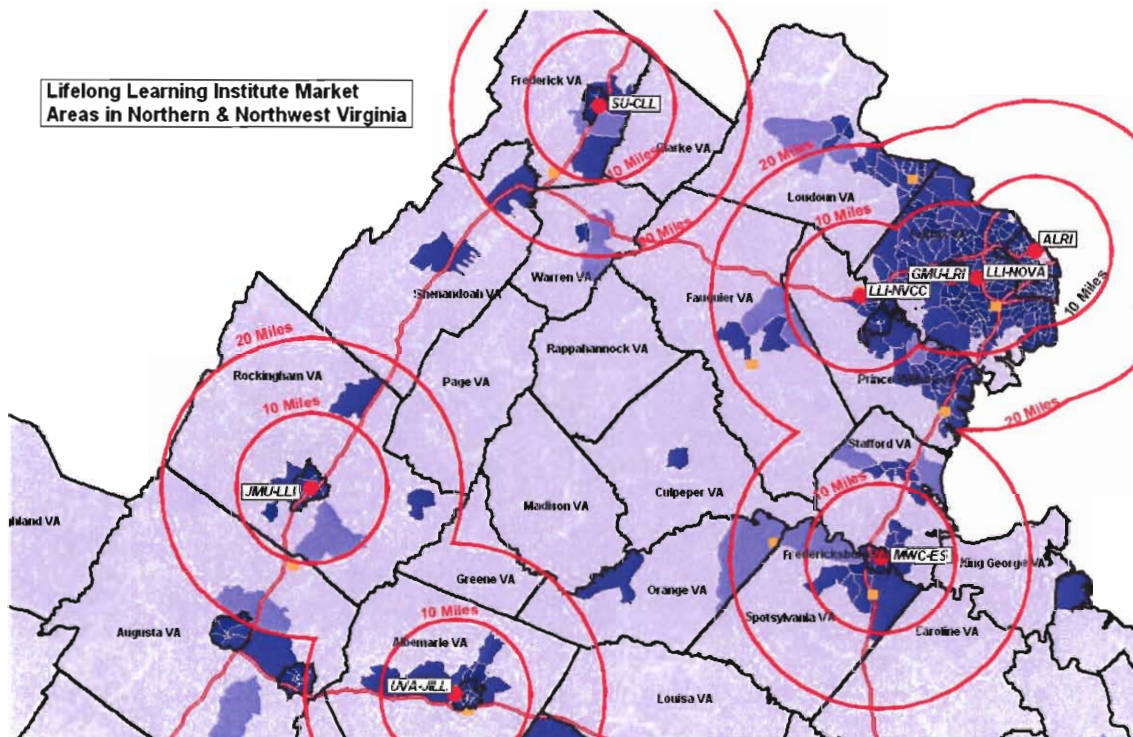


Data derived from Census 2000, compiled by Kevin Byrnes, VA Dept Aging (VDA)

Figure 4 - Northern Virginia Lifelong Learning Institute Market Areas

The map above (Figure 4) illustrates the market areas for Shenandoah University Center for Lifelong Learning (SU-CLL), Arlington Learning in Retirement Institute (ALRI) associated with George Mason University, the Osher Lifelong Learning Institute at GMU (OLLI-GMU) (formerly GMU-Learning in Retirement Institute GMU-LRI), the Lifelong Learning Institute at Northern Virginia Community (LLI-NOVA, Annandale), NVCC-LLI Manassas, and the Mary Washington College (recently renamed the University of Mary Washington) ElderStudy (MW-ES) with 10 mile and 20 mile area rings.

Figure 5 - Lifelong Learning Institute Market Areas Northern & NW Virginia

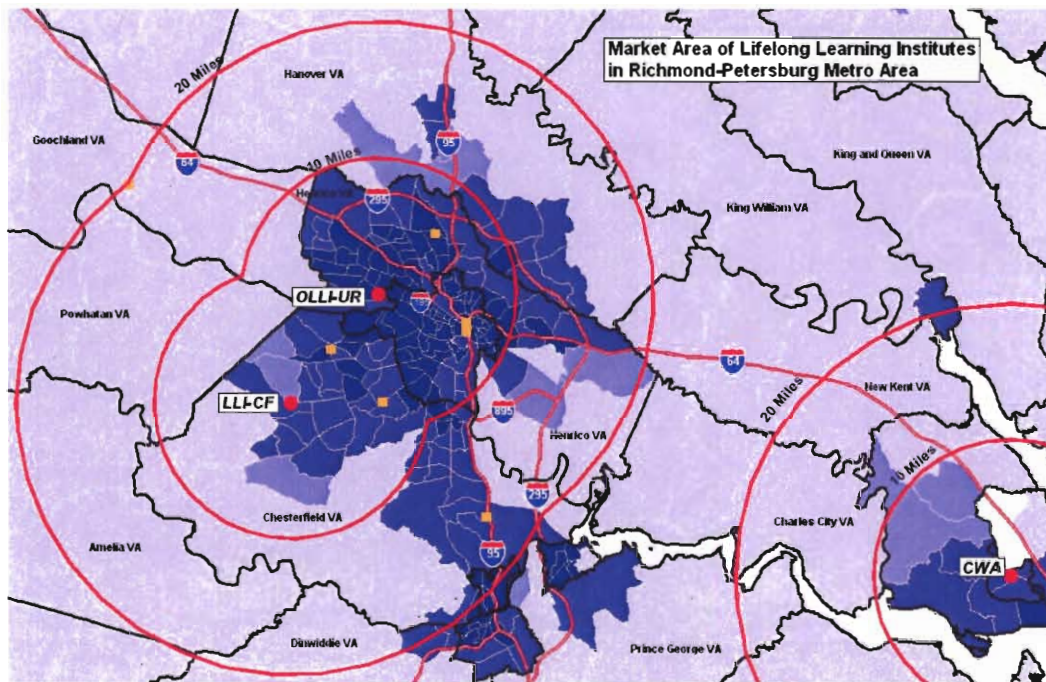


Data derived from Census 2000, compiled by Kevin Byrnes, VA Dept Aging (VDA)

Figure 5 - Lifelong Learning Institute Market Areas Northern & NW Virginia

The map above (Figure 5) illustrates the market areas for Shenandoah University Center for Lifelong Learning (SU-CLL), Arlington Learning in Retirement Institute (ALRI) associated with George Mason University (GMU), the Osher Lifelong Learning Institute at GMU (OLLI-GMU) (formerly GMU-Learning in Retirement Institute (GMU-LRI), Lifelong Learning Institute at Northern Virginia Community (LLI-NOVA, Annandale), and NVCC-LLI Manassas, Mary Washington ElderStudy (MW-ES, Fredericksburg), James Madison University LLI in Harrisonburg, and the University of Virginia Jefferson Institute for Lifelong Learning (UVA-JILL), Charlottesville, with 10 and 20 mile rings.

Figure 6 – Market Areas of Lifelong Learning Institutes in R-P Metro Area

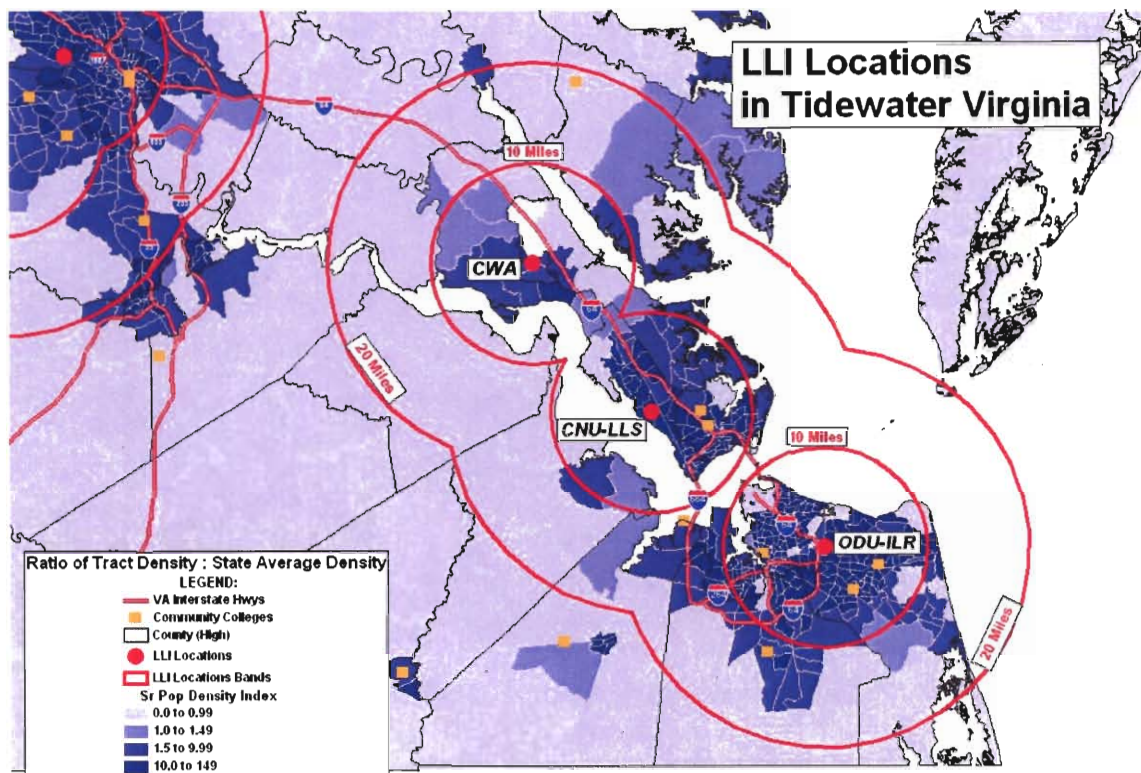


Data derived from Census 2000, compiled by Kevin Byrnes, VA Dept Aging (VDA)

Figure 6 – Market Areas of Lifelong Learning Institutes in R-P Metro Area

The map above (Figure 6) illustrates the market areas of the Osher Lifelong Learning Institute at the University of Richmond (OLLI-UR), the Lifelong Learning Institute in Chesterfield (LLI-CF), and the Christopher Wren Association (CWA) at the College of William and Mary in Williamsburg with ten mile and twenty mile rings.

Figure 7 – LLI locations in Tidewater Virginia

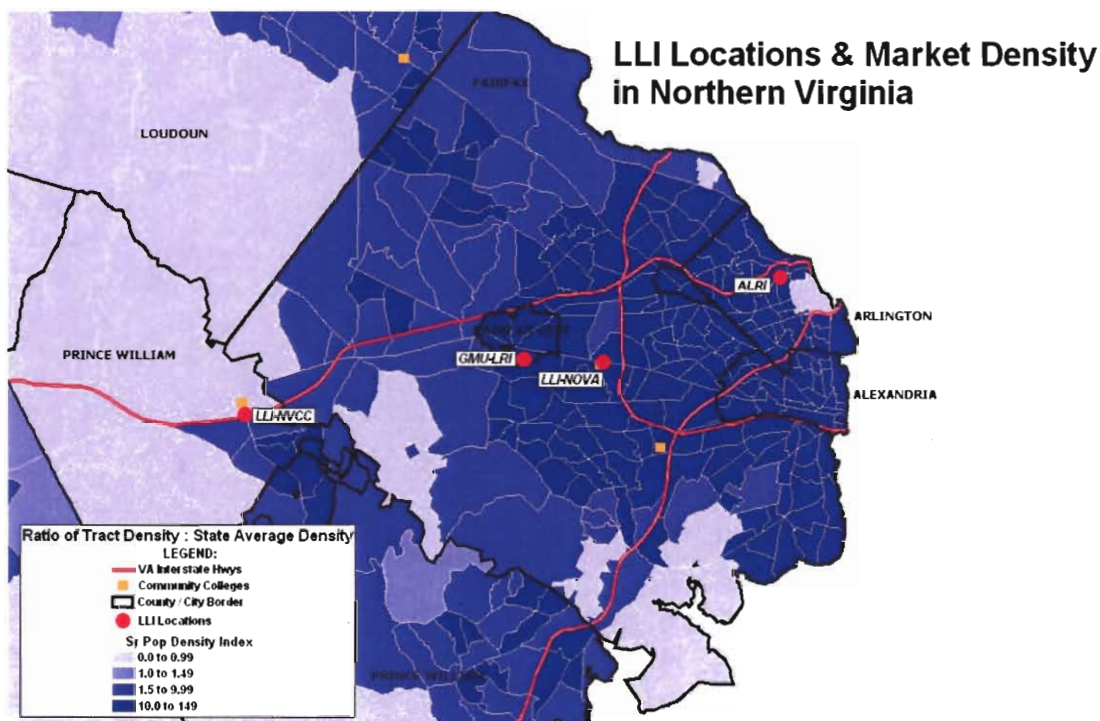


Data derived from Census 2000, compiled by Kevin Byrnes, VA Dept Aging (VDA)

Figure 7 – LLI locations in Tidewater Virginia

The map above (Figure 7) illustrates the market areas of the Christopher Wren Association (CWA) at the College of William and Mary in Williamsburg, Christopher Newport University Lifelong Learning Society (CNU-LLS), and the Old Dominion University Institute for Learning in Retirement (ODU-ILR) with ten mile and twenty mile rings.

Figure 9 – LLIs & Market Density in Northern Virginia

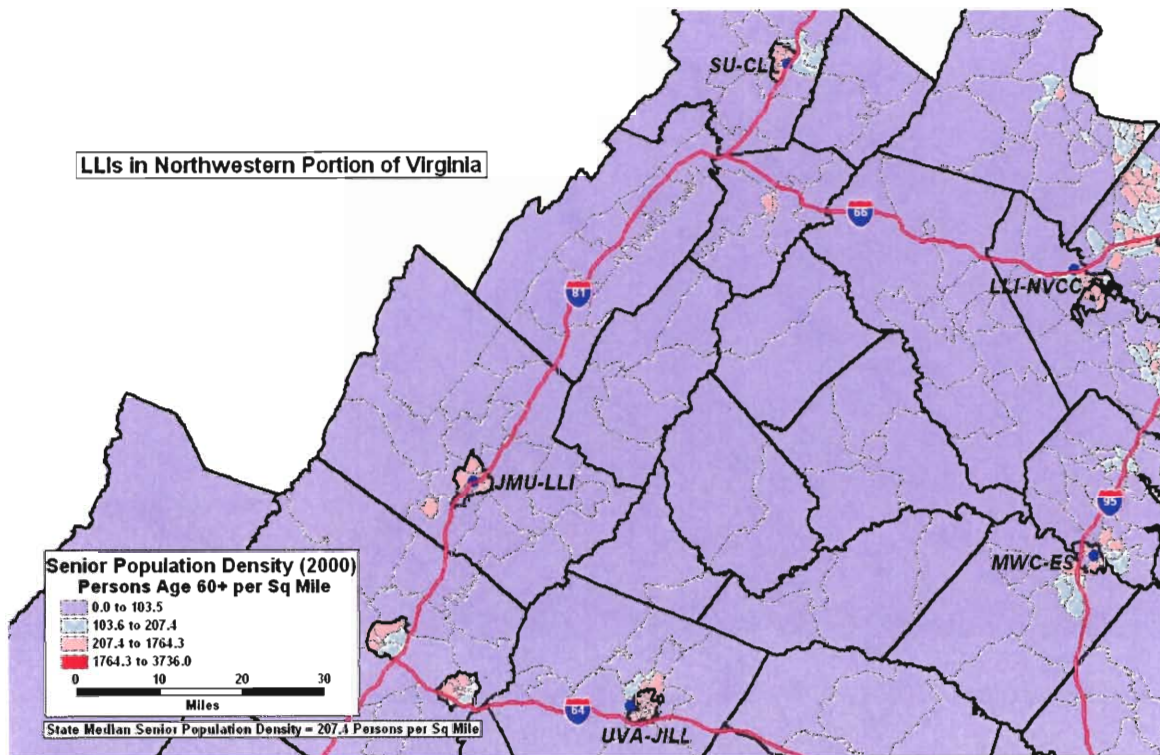


Data derived from Census 2000, compiled by Kevin Byrnes, VA Dept Aging (VDA)

Figure 9 – LLIs & Market Density in Northern Virginia

The map above (Figure 9) illustrates the LLIs and population density in the Northern Virginia market areas for the Arlington Learning in Retirement Institute (ALRI) associated with George Mason University (GMU) which serves over 400 seniors, the Osher Lifelong Learning Institute at GMU (OLLI-GMU) (formerly GMU-Learning in Retirement Institute (GMU-LRI) which serves about 655 members, Lifelong Learning Institute at Northern Virginia Community (LLI-NOVA) (Annandale) serving about 335, and the fledgling NVCC-LLI (Manassas) which served its first 10 members in Fall 2003.

Figure 10 – Population Density & LLIs in NW Virginia

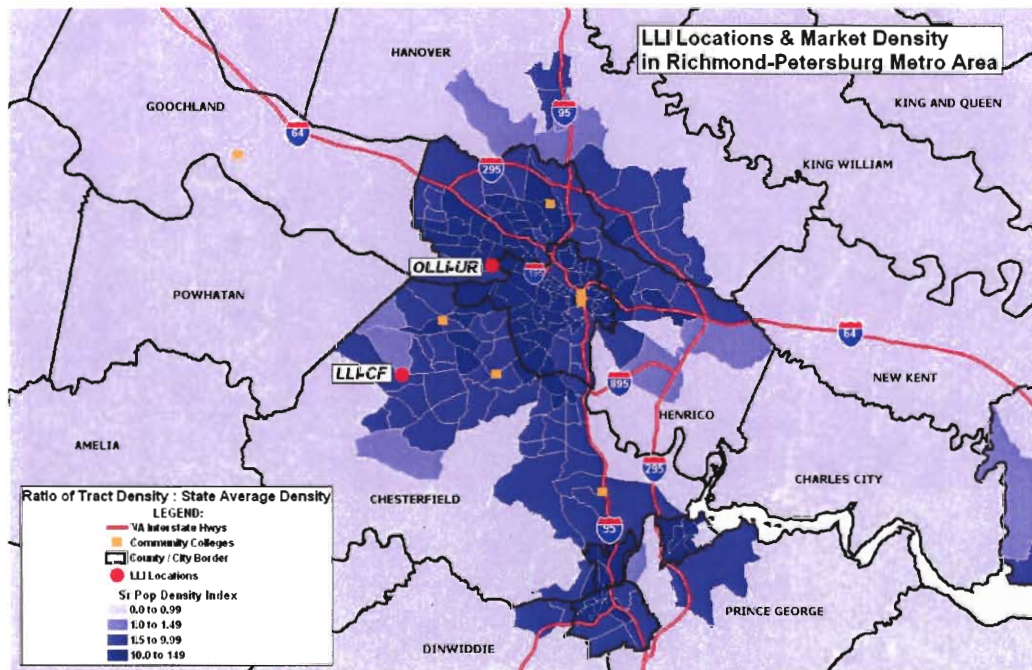


Data derived from Census 2000, compiled by Kevin Byrnes, VA Dept Aging (VDA)

Figure 10 – Population Density & LLIs in NW Virginia

The figure above (Figure 10) illustrates the population density and LLIs in northwestern Virginia. The Shenandoah University Center for Lifelong Learning (SU-CLL) and the James Madison University Lifelong Learning Institute (JMU-LLI) each serve more than one hundred seniors. The University of Virginia Jefferson Institute for Lifelong Learning (UVA-JILL) has over 540 senior members. Mary Washington College ElderStudy (MWC-ES) serves some 280 members.

Figure 11 – LLI Locations & Market Density in R-P Metro Area

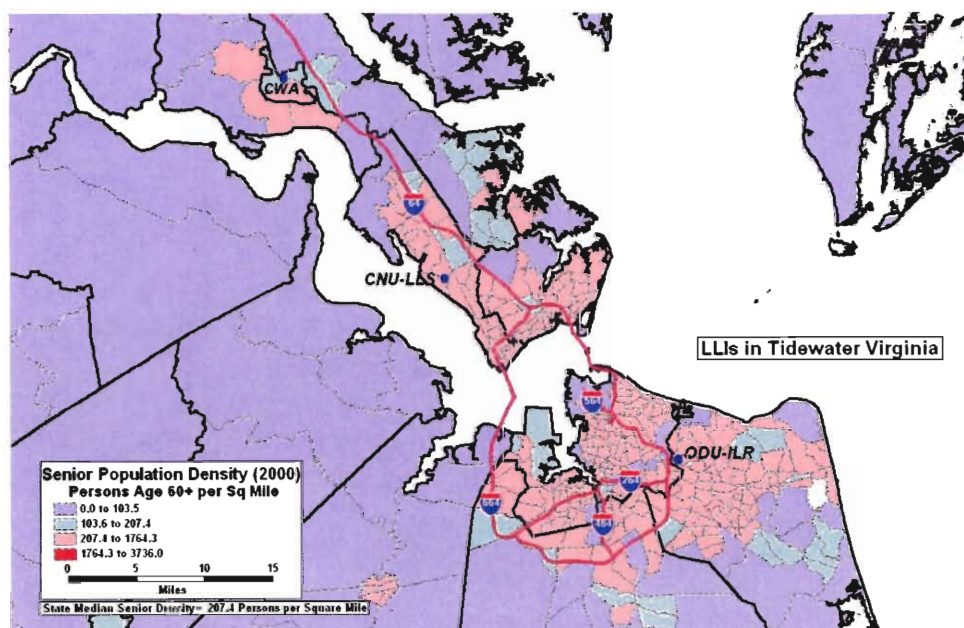


Data derived from Census 2000, compiled by Kevin Byrnes, VA Dept Aging (VDA)

Figure 11 – LLI Locations & Market Density in R-P Metro Area

The densely populated (Figure 11) Richmond-Petersburg metropolitan market area has seen two new LLIs open in 2004 to complement a host of other senior learning opportunities in the area. The Lifelong Learning Institute in Chesterfield (LLI-CF) and the Osher Lifelong Learning Institute at the University of Richmond (OLLI-UR) each hosted their first classes in March 2004 and have less than one hundred members at this writing.

Figure 12 – Senior Population Density & LLIs in Tidewater



Data derived from Census 2000, compiled by Kevin Byrnes, VA Dept Aging (VDA)

Figure 12 – Senior Population Density & LLIs in Tidewater

The figure above (Figure 12) illustrates the senior population density and the three LLIs serving the Tidewater communities. The Christopher Wren Association (CWA) at the College of William and Mary in Williamsburg serves over 1100 members, the Christopher Newport University Lifelong Learning Society (CNU-LLS) in Newport News serves over 400 members, and the Old Dominion University Institute for Learning in Retirement (ODU-ILR) has over 500 members. The three Tidewater Lifelong Learning Institutes are serving almost 3,000 senior members in high density areas which represent almost half the senior student seats in the Commonwealth.

Figure 13 – Lifelong Learning Institutes and Community Colleges in Virginia

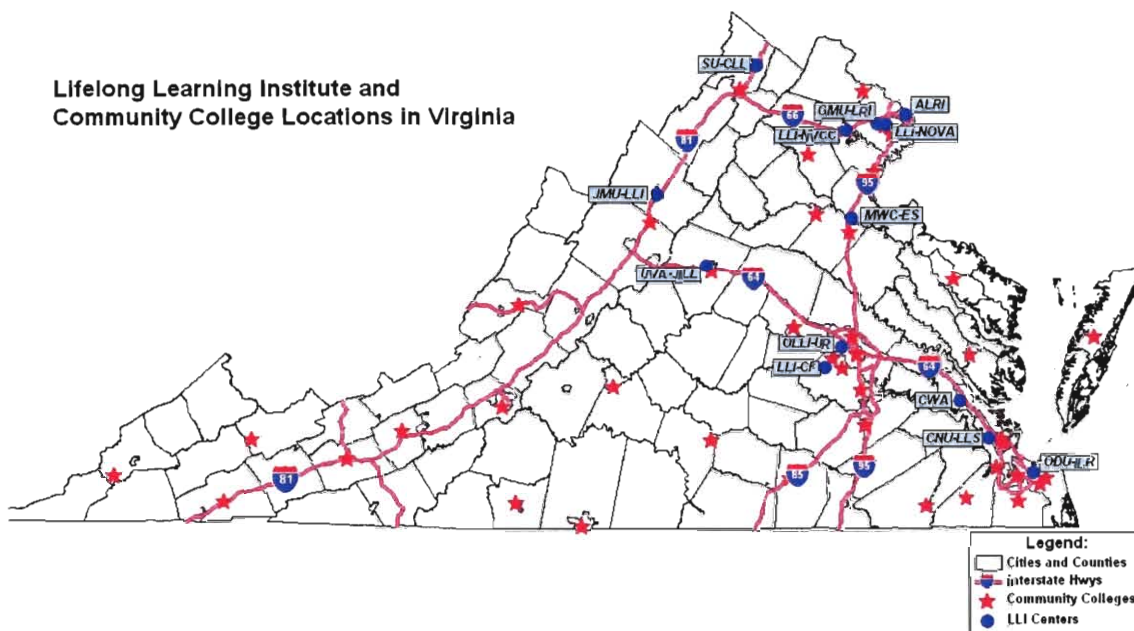


Figure 13 – Lifelong Learning Institutes and Community Colleges in Virginia

The figure above (Figure 13) illustrates the well-distributed community college system (red stars) throughout the Commonwealth of Virginia. For those communities which presently have no Lifelong Learning Institute (blue dots) or other alternative learning resource for seniors, the local community colleges could potentially become the senior learning centers.

Table 2 - Senior Population Market Statistics 0-10 mile area**Market Area Statistics: 0- 10 Miles (Area = 312.57 Sq Miles)**

LLI Site	Ages 15 to 24	Age 25 to 34	Age 35 to 44	Age 45 to 54	Age 55 to 64	Age 65 to 74	Age 75 to 84	Age 85+	Total Population
LLI-NOVA	125,796	192,876	188,992	164,024	94,827	50,780	32,500	10,260	1,056,443
GMU-LRI	106,639	147,941	166,052	145,388	81,701	41,575	24,722	7,427	907,848
ALRI	83,757	148,839	129,093	106,503	62,935	38,042	26,898	8,379	728,305
ODU-ILR	119,441	111,539	115,506	85,453	50,403	38,723	25,315	7,633	712,044
OLLI-UR	70,942	81,490	87,715	75,780	42,662	32,782	23,505	8,275	530,655
CNU-LLS	56,102	53,760	63,143	45,131	28,683	20,150	12,791	3,545	364,206
LLI-NVCC	33,711	48,893	53,976	39,033	19,436	8,227	3,741	1,135	275,899
LLI-CF	24,939	27,592	37,645	35,054	17,844	11,342	6,884	1,869	211,549
MWC-ES	17,917	17,707	21,585	16,925	9,620	6,238	3,885	1,312	124,390
UVA-JILL	22,785	15,026	14,361	12,404	7,542	5,980	4,205	1,543	101,382
SU-CLL	10,069	10,713	13,374	10,747	7,187	5,309	3,149	995	77,667
CWA	13,259	8,597	11,582	10,252	7,875	6,477	3,735	1,197	76,699
JMU-LLI	22,226	8,622	9,471	8,115	5,348	4,286	3,228	1,317	74,820

Data derived from the 2000 Census and compiled by Kevin Byrnes, Virginia Department on Aging

Table 2 - Senior Population Market Statistics 0-10 mile area

The table above (Table 2) represents the statistical data which support the illustrative maps and population density figures which preceded these tables. The sites are arrayed above from the most dense to the least dense within the zero to ten mile radius from the adult learning center. The order of the sites changes slightly from table to table between the 0-10 mile table and the 10-20 mile table. The total area table details the statistical totals for the 0-20 mile area arrayed from the most dense to the least dense. For example, the most dense location is the Lifelong Learning Institute Northern Virginia (LLI-NOVA) which has more than a million people within its ten mile target area.

Table 3 - Senior Population Market Statistics 10-20 mile area

Market Area Statistics: 10- 20 Miles (Area = 625.13 Sq Miles)									
LLI Site	Ages 15 to 24	Age 25 to 34	Age 35 to 44	Age 45 to 54	Age 55 to 64	Age 65 to 74	Age 75 to 84	Age 85+	Total Population
LLI-NVCC	117,139	150,745	184,282	154,134	84,952	41,197	22,471	6,595	982,271
GMU-LRI	100,881	160,482	157,930	116,430	62,084	31,122	19,277	6,039	835,080
ALRI	83,278	104,104	130,434	113,185	59,614	25,460	13,108	3,912	690,734
LLI-NOVA	78,545	110,127	128,769	94,136	46,948	20,916	11,035	3,113	656,271
LLI-CF	74,079	86,152	92,804	76,348	44,782	33,149	23,340	8,264	550,601
ODU-ILR	65,448	65,101	81,547	57,967	34,777	24,089	15,262	3,852	448,471
CNU-LLS	82,402	63,887	69,032	54,476	34,578	27,413	19,203	5,525	449,672
OLLI-UR	32,178	36,353	49,951	41,706	23,375	13,839	7,824	2,151	268,449
CWA	31,021	31,117	38,257	28,854	18,686	12,316	7,285	2,245	218,988
MWC-ES	14,759	15,318	21,366	15,167	8,587	4,654	2,392	633	111,524
UVA-JILL	7,229	9,221	12,185	10,492	7,242	5,244	2,470	681	69,138
JMU-LLI	7,649	8,345	10,822	9,680	6,691	4,983	2,937	821	65,166
SU-CLL	5,803	6,783	9,644	7,936	5,585	3,725	2,225	673	53,586

Data derived from the 2000 Census and compiled by Kevin Byrnes, Virginia Department on Aging

Table 3 - Senior Population Market Statistics 10-20 mile area

Table 3 (above) represents the statistical data which support the illustrative maps and population density figures which preceded these tables. The sites are arrayed above from the most dense to the least dense within the ten mile to twenty mile radius from the adult learning center. The order of the sites changes slightly from table to table between the 0-10 mile table and the 10-20 mile table. The total area table details the statistical totals for the 0-20 mile area arrayed from the most dense to the least dense. For example, the Lifelong Learning Institute at Northern Virginia Community College (LLI-NVCC) has the most dense population in its 10-20 miles band of suburbia.

Table 4 - Senior Population Market Statistics 0-20 mile total area**Total Market Area: 0- 20 Miles (Area = 937.7 Sq Miles)**

LLI Site	Ages 15 to 24	Age 25 to 34	Age 35 to 44	Age 45 to 54	Age 55 to 64	Age 65 to 74	Age 75 to 84	Age 85+	Total Population
GMU-LRI	207,521	308,423	323,982	261,818	143,785	72,697	43,999	13,467	1,742,928
LLI-NOVA	204,341	303,003	317,762	258,160	141,775	71,696	43,534	13,373	1,712,714
ALRI	167,036	252,943	259,527	219,687	122,549	63,502	40,006	12,291	1,419,039
LLI-NVCC	150,850	199,638	238,258	193,167	104,388	49,424	26,212	7,730	1,258,169
ODU-ILR	184,889	176,640	197,053	143,420	85,180	62,812	40,577	11,486	1,160,514
OLLI-UR	103,120	117,843	137,666	117,486	66,037	46,621	31,329	10,425	799,104
LLI-CF	99,019	113,744	130,449	111,402	62,626	44,491	30,223	10,133	762,150
CNU-LLS	138,505	117,646	132,175	99,607	63,261	47,562	31,994	9,070	813,877
CWA	44,281	39,714	49,839	39,107	26,561	18,794	11,020	3,442	295,687
MWC-ES	32,677	33,025	42,952	32,092	18,207	10,892	6,278	1,945	235,914
UVA-JILL	30,013	24,247	26,546	22,896	14,784	11,223	6,675	2,224	170,520
SU-CLL	15,872	17,495	23,019	18,683	12,772	9,034	5,374	1,668	131,253
JMU-LLI	29,875	16,968	20,293	17,796	12,038	9,269	6,165	2,138	139,985

Data derived from the 2000 Census and compiled by Kevin Byrnes, Virginia Department on Aging

Table 4 - Senior Population Market Statistics 0-20 mile total area

Table 4 (above) represents the statistical data which support the illustrative maps and population density figures which preceded these tables. The sites are arrayed above from the most dense to the least dense within the twenty mile radius from the adult learning center. The order of the sites changes slightly from table to table between the 0-10 mile table and the 10-20 mile table. The total area table details the statistical totals for the 0-20 mile area arrayed from the most dense to the least dense. For example, the Osher Lifelong Learning Institute at George Mason University (OLLI-GMU) has the most dense population within its 20 mile band.)

Origination Characteristics

The thirteen purposeful sample subjects, the Elderhostel-affiliated Lifelong Learning Institutes, were constituted since 1988 in Virginia. Notably, three of the Lifelong Learning Institutes have only recently conducted their first classes. Most of the LLIs have incorporated to limit their liabilities and are committed to assuring the pursuit of public benefits. Most have sought status as not-for-profit tax-exempted (501C3) entities to protect their members and enjoy the full measure of the benefits of generous contributions and donations to both the LLIs and the host institutions. Some LLIs have been the beneficiaries of the estates of their members. The subjects are almost evenly divided about securing both written agreements with their host institutions and obtaining liability insurance coverage. See the following Table 5, Origination Characteristics, for individual LLI details.

Table 5 – Origination Characteristics

Host/LLI	Year Established	Incorporated	501C3	Written Host Agreement	Liability Insurance
CNU-LLS	1988	No	No	No	No
ALRI-GMU	2003	Yes	Yes	Yes	Yes
OLLI-GMU	1991	Yes	Yes	Yes	Yes
JMU-LLI	1996	No	No	No	No
LLI-NOVA	1996	Yes	Yes	No	Yes
LLI-NVCC*1	2003	Yes	Yes	Yes	Yes
MWC-ES	1993	No	Yes	Yes	No
ODU-ILR	1993	Yes	Yes	Yes	Yes
SU-CLL	2001	Yes	Yes	Yes	Yes
UVA-JILL	2001	Yes	Yes	No	Yes
LLI-CF*2	2002	Yes	Yes	No	No
W&M-CWA	1990	No	Yes	No	No
OLLI-UR*2	2004	No	Yes	Yes	Yes

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JMU-LLI – James Madison University – Lifelong Learning Institute, Harrisonburg, VA

LLI-NOVA – Lifetime Learning Institute of Northern Virginia, Northern Virginia Community
College, Annandale, VA

LLI-NVCC – Lifelong Learning Institute of Northern Virginia Community College, Manassas
Campus, Manassas, VA

MWC-ES – Mary Washington College ElderStudy, Fredericksburg, VA

ODU-ILR – Old Dominion University Institute for Learning in Retirement, Virginia Beach, VA

SU-CLL – Shenandoah University College for Lifelong Learning, Winchester, VA

UVA-JILL - University of Virginia Jefferson Institute for Lifelong Learning, Charlottesville, VA

LLI-CF – Lifelong Learning Institute, Chesterfield, VA

W&M-CWA – College of William & Mary Christopher Wren Association, Williamsburg, VA

OLLI-UR – Osher Lifelong Learning Institute, University of Richmond, Richmond, VA

(OLLI-HU - Insufficient data available to report here on new LLI at Hampton University in 2005.)

Table 5 – Origination Characteristics

Host Relationship Characteristics

Most of the LLIs enjoy many benefits of their relationships with large university campuses. These benefits include an assortment of part-time support personnel and administrative services, office and classroom spaces, auditoriums, and concert halls, audio and video equipment, utilities, phone, fax, and computer support, postal services, etc. Parking is free at some, designated at some, restricted at some, and denied at some. Much of this support is a coordinated dance of informal agreements with minimal facilities and maintenance fees. Shenandoah University's Center for Lifelong Learning is envied for its own building, dedicated classrooms, computer lab, conference rooms and its own service kitchen. In some cases, the host university allows the LLI the use of its purchasing power to obtain equipment at the academic rates. Some LLIs use off-campus facilities such as senior centers, churches and synagogues, local government centers, or retirement community residential space. Occasionally, some LLIs use historical or performance locations as educational venues for their classes.

Some LLIs have mutually beneficial relationships whereby the LLI members take and/or teach classes for the host, participate in mentoring programs and scholarship development, speaker services and more. The Christopher Newport Lifelong Learning Society boasts an active membership extensively involved in supporting extra-curricular activities – season tickets for sporting events, members and officers of the Theater Guild and Friends of Music, co-hosting and coordinating campus conferences on aging, gardening, and writing. Most LLIs operate independently of the host institution with a

symbiotic relationship often coordinated through the School of Adult and Continuing Education. The University of Virginia's Jefferson Institute for Lifelong Learning advertises in the university's catalog. The other LLIs publish their own separate catalogs and autonomously manage their own curriculums and schedules. Members fees are paid directly to the LLIs and often separate accounting functions are audited annually. Some LLIs must pay their hosts for accounting services.

LLIs may be valuable fundraisers for their hosts. For example, the Christopher Wren Association (CWA) honored its special relationship with the College of William and Mary with over \$80,000 in gifts in 2005. These direct CWA gifts funded scholarships, the campus library, campus museum, campus art gallery, research and studies. Of course, many CWA members are alumni who privately give back to the college in ways that are not reported through CWA. Comparatively, George Mason's LLI of similar size gave \$6,000 to its host this year.

Additionally, LLI members donate many volunteer hours of service and products to their hosts. When state budget cuts made William and Mary unable to staff the annual high school academic competition, CWA members stepped forward to plan, support and execute what became an intergenerational event.

See the following Table 6, Host Relationship Characteristics, for individual LLI details.

Table 6 – Host Relationship Characteristics

Host/LLI	Host Services	Host Charges	Meet on Campus	Scholarships to Host	Support to Host
CNU-LLS	Yes	Yes	Yes + other locations	Yes	Yes + %
ALRI-GMU	Yes	Yes	Yes+	No	No
OLLI-GMU	Yes	No	Yes +	Yes	Mentors
JMU-LLI	Yes	No	Yes	Yes	
LLI-NOVA	Yes	No	Yes +	Yes	
LLI-NVCC*1	Yes	No	Yes	No	
MWC-ES	Yes	No	Yes	Yes	Yes
ODU-ILR	Yes	No	No	No	
SU-CLL	Yes	No	No	No	Take&Teach
UVA-JILL	Yes	Yes	No	No	Yes
LLI-CF*2	No	No	No	No	
W&M-CWA	Yes	No	Yes +	Yes	Yes
OLLI-UR*2	Yes	No	Yes	No	No

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Table 6 – Host Relationship Characteristics

Membership Characteristics and Fees

The thirteen Lifelong Learning Institutes in Virginia serve about six thousand older adult learners today – and certainly will not nearly be sufficient to serve over two million mature Virginians in the foreseeable future (~2025). Some LLIs have already reached or exceeded their self-determined maximum capacity for participation as they are presently organized and supported. Although the membership fees are modest when compared to rapidly rising college costs, the fees are still a luxury for those on a fixed income or constrained by health and/or wealth issues and mobility limitations. See the following Table 7, Membership Characteristics and Fees, for individual LLI details.

Table 7 – Membership and Fees

Host/LLI	Full Members Fall 03/05	Annual Membership Fees	Associate Members Fall 2003	Associate Member Fees	Special Members
CNU-LLS	(03) 401 (05) 480	\$140. \$165.	28 ~20	\$75. \$90.	Spr \$120./65. Sum \$80./35. (full/associate)
ALRI- GMU	(03) 400 (05) 517	\$55./\$45.p/class			
OLLI- GMU	(03) 655 (05) 680	\$270. \$280.			
JMU-LLI	(03) 500 (05) 589	\$12.+\$35.p/class			
LLI-NOVA	(03) 335	\$100.			
NVCC*1	(03) 10 (05) 95	\$100.			
MWC-ES	(03) 280 (03) 235	\$75./125. Single/couple			\$37.50/62.50 Spring Only
ODU-ILR	(03) 500 (05) 670	\$15./25.+5./hr			
SU-CLL	~100	\$199.			\$74. per sem
UVA-JILL	(03) 540 (05) 526	\$300.	15	\$25.	\$75. per sem
LLI-CF*2	(03) 97 (05) 130	\$150.			
W&M- CWA	(03) 992 (05) 1500	\$75./sem	127 (spr03)	\$25.	\$75./25. sem
OLLI- UR*2	(03) 30 (05) 302	\$400./ann \$150./sem			\$50.p/class

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Table 7 – Membership and Fees

Semester Characteristics

The Lifelong Learning Institutes variously conduct two, three or four semesters per year, and each semester classes are scheduled to meet as little as once or twice per semester for a class meeting or for as many as the traditional sixteen weekly class meetings per semester. Some classes which only meet once may be conducted as a one day seminar with lunch. Classes most often meet for two hour periods and include a brief coffee and cookie break for socializing.

The LLIs are not bound to a requirement for a minimum number of contact hours with students. The absence of credentialing for credit exempts these lifelong learning extracurricular and social learning events from the traditional requirements for pre-qualifying requisite studies, attendance, grades, papers, and exams.

Before 2002 when the Elderhostel Institute Network (EIN) led more than 300 Lifelong Learning Institutes in the United States, EIN routinely required LLIs to submit their curricula to EIN for review and approval. The purpose of the review was to enforce a standardized degree of 'academic rigor' to all the sites associated with Elderhostel. The EIN coordinator, Nancy Mertz-Nordstrom reports that no curricula were disapproved. Each LLI developed their own curricula at the pleasure of its membership. Notably, although standards vary from LLI to LLI, they remain remarkably high without external supervision or approval and clearly reflect the unique membership profile of each group.

As levels of education across our population continue to grow, we may reasonably expect to see the same rising levels of education reflected in the membership of the LLIs. The LLIs are already magnets for the "enquiring minds" of well-educated

lifelong learners and this strong correlation that previous education predicts participation in lifelong learning may be expected grow, too.

Because older adult learners have frequently chosen shorter classes to fit between their retirement travels and other activities, some LLIs conduct more than one shorter session per semester. Four of the Virginia LLIs conduct summer sessions while the majority concentrate their offerings in the fall, winter, and spring. The LLIs offer ambitious schedules of many and varied courses which often meet their maximum capacity before all the registration requests are satisfied. Many LLIs maintain long waiting lists of applicants for LLI membership. Many applicants wait several years for admission to a LLI. This researcher sees this maximum capacity factor as an indicator that unmet needs exist in service areas. See the discussion of the Cap Phenomenon on page 71 and the details at Table 9, Other Characteristics.

Many of the Virginia LLIs have precious little historical data because they have no compelling reporting requirements from their hosts or from Elderhostel, which has become an online virtual integrator and no longer has any directive authority over the independent sites. Despite the volume, some of our most vigorous sites in Virginia are operated by volunteers who manually (i.e., not computerized) administer their curricula and enrollment for an ever increasing volume of members. For example, the Christopher Wren Association at the College of William and Mary mails about 2,000 copies of its ~65 course offerings each semester, enrolls about 1,500 students, and sends other mailings all year. This is a monumental workload for a dedicated volunteer committee. See Table 8, Semester Characteristics, which follows.

Table 8 – Semester Characteristics

	SEM/ YR	WKS / SEM	SESS/ SEM	CRS/ SEM	SUM SEM	WKS SUM	CRS/ SUM
CNU-LLS	3	10	2	21	Yes	3	20
ALRI-GMU	2	12	1	30	No		
OLLI-GMU	4	8	1	50	Yes	6	50
JMU-LLI	2	2-5	1	20	No		
LLI-NOVA	4	16	1	30	Yes	12	15
LLI-NVCC*1	2	2-5	1	7			
MWC-ES	2	14	1	40	No		
ODU-ILR	4	8	1	25	Yes	8	25
SU-CLL	3	5-8	1-2	25	No		
UVA-JILL	2	5	3-5	43	No		
LLI-CF*2	3	8	1	25	Yes	4	25
W&M-CWA	2	12	2	65	No		
OLLI-UR*2	3	16	1	33	Yes	16	33

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Table 8 – Semester Characteristics

Other Characteristics

Other characteristics that differentiate the Lifelong Learning Institutes include whether the facilitators or teachers are paid for their services. Most classes are led by an assortment of volunteer members, retired faculty, outside experts, and current faculty. Most staff are not compensated except for the profuse thanks, recognition ceremonies with token gifts, and the profound gratification of being immersed in the membership of stimulated “inquiring minds.” The few that compensate their teachers and speakers pay them much less than the usual rate for the lifetime expertise of those who just love to share it.

Most of the LLIs participate in some form of fund raising for their own benefit or that of their host institution. Many LLIs sponsor scholarships or special projects for their hosts. Some LLIs have been beneficiaries of their members. Most of the LLIs conduct one day field trips and some even host overnight field trips. See the following Table 9, Other Characteristics, for greater detail.

Table 9 – Other Characteristics

Host/LLI	PAID TO TEACH & SPEAK?	FUND RAISING (self & host)	FIELD TRIPS ONE DAY	FIELD TRIPS OVERNIGHTS	ESTABLISH MAXIMUM CAPACITY?
CNU-LLS	\$150./5wk \$40. each	Yes	Yes	Yes	No
ALRI-GMU	No	Yes	Yes	No	discussed
OLLI-GMU	No	Yes	Yes	No	discussed
JMU-LLI	\$200./course	No	Yes	No	discussed
LLI-NOVA	No	Yes	Yes	Yes	discussed
LLI-NVCC*1	No	No	No	No	No
MWC-ES	\$75./course	No	Yes	No	No
ODU-ILR	\$20./hr	No	Yes	Yes	Max class size 35
SU-CLL	\$375./course	No	No	No	No
UVA-JILL	No	Yes	Yes	No	No
LLI-CF*2	No	Yes	Yes	Yes	No
W&M-CWA	No	No	Yes	Yes	No
OLLI-UR*2	No	No	No	No	No

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Table 9 – Other Characteristics

The ‘Cap’ Phenomena

The Mid-Atlantic ILR Conference in October 2003 included representatives from Harvard, Northwestern, New School, Brandeis, Tufts, and Boston College. In a session on “Strategic Planning and How to Manage Growth,” representatives from the Academy of Lifelong Learning (ALL) at Carnegie Mellon University (CMU) reported that they had maintained a waiting list for admission of about 600 applicants for several years and that applicants may reach the front of the line by doing favors for the program (examples: teaching a course or making a substantial donation). ALL at CMU representatives admitted to having some money in the bank that might be used for expanding their facilities, but they preferred to maintain the ‘exclusivity’ of their organization rather than grow to meet the demand. In June 2003, representatives from the Duke Institute for Learning in Retirement (DILR) reported that they have maintained their open admissions policy for almost thirty years and currently serve about 1,200 members. The developing Northwestern ILR allows members to enroll at will. Conversely, in 2003, Harvard and other Institutes for Learning in Retirement (ILRs) conducted qualifying interviews for applicants and admitted only one in three applicants. The Duke ILR representatives further observed that few of its members, less than 1% in fact, claim North Carolina as their state of origin. This phenomenon is notable for all the lifelong learning organizations in attractive retirement locations. Such locations may expect to grow at a disproportionately greater rate as the population grays. Perhaps the maximum capacity phenomena is already more common than known and has only recently appeared in Virginia. See Table 9, Other Characteristics, for individual LLI details.

Summary

Chapter Four begins with an overview of the thirteen primary study subjects arrayed upon a map of the Commonwealth of Virginia. Noticeably, all the Lifelong Learning Institutes thriving within colleges and universities are located along the major population corridors along Interstate routes I-95, I-81, and I-64. The discussion of the population and distribution data narrows to the ten miles and twenty miles concentric circles around each LLI. Many LLIs claim that about 90% of their membership lives within 10 miles of the LLI and the remainder within twenty miles. Figures 3 to 12 illustrate these market areas. Figure 13 serves to illustrate the well-distributed community colleges. Tables 2, 3, and 4 detail the senior population market statistics. Table 5 captures the origination characteristics of each LLI: the year established, if incorporated, 501C3 tax exempt status, and whether they have codified host agreements and liability insurance. Table 6 reports if host services are provided, if the host charges for those services, whether classes meet on campus, if the LLI sponsors scholarships for the host institution or other support to the host. Table 7 enumerates the 2003 and 2005 enrollment, membership and other fees. Table 8 describes the various semester characteristics of the LLIs. Table 9 illuminates other characteristics: payment of instructors, fundraising, field trips and the most notable indicator of efforts to control vigorous growth – establishment of a maximum capacity phenomena and is followed by a brief discussion of this phenomena.

Appendix F contains an extensive interview with two retired sociology professors who established LLIs at their respective institutions and shared their story with me. These accounts are strewn with pearls of wisdom for all LLIs, old and new.

Appendix G surveys “Learning in Retirement Residences” which have responded readily to the demand for learning at leisure in their private communities.

Appendix H contains a summary of a report on “Education While Working,” the results of a study of adult education policies which finds relatively few people participate in employee education opportunities because they are too busy making a living.

Appendix I includes local and national conference reports.

CHAPTER 5

Summary, Conclusions, Recommendations

Summary

“Grow old along with me, the best is yet to be.” (Robert Browning, 1812-1889)

Chapter One served as a general introduction to the problem, the rationale for the study, problem statements and research questions. Virginia’s aging population and the distribution of the population’s aging density across the Commonwealth is generally described in Chapter One and further detailed in Chapter Four. Traditional models for senior adult education arising from very little state legislation on the subject are reported in Chapter One. The state unwanted tuition free offer is summarized. The Volunteer Model which surged into popularity on public campuses in Virginia in less than twenty years is outlined in limited contrast to the Traditional Model and later reported in detail in Chapter Four, Findings.

Only a few examples of other models for lifelong learning are cited here for information and contrast to the primary study subjects. There are many and varied senior service centers throughout the Commonwealth of Virginia offering senior adult education together with providing social services, meals, etc. Other sources of services include public and private colleges, universities and their alumni activities; senior centers; federal, state, regional, county, and municipal agencies for the aging; hospitals; retirement/recreation centers; investment companies/banks; museums; and a vast array on-line via the Internet. This research does not seek to identify them all. The focus of

this study is limited to the purposeful subjects identified as providers of academic college-level non-traditional lifelong learning volunteer models detailed in the research findings in Chapter Four.

The literature selected for review in Chapter Two reflected the interdisciplinary nature of the fields of public policy, gerontology, and adult, continuing and higher education as inextricably entwined. The purpose of this study is to serve as a baseline public policy study of lifelong learners (age 50 or better) in post-secondary education studying in the Commonwealth of Virginia (VA) and the resulting academic study services provided.

This study assembled the naturally occurring data arising from the pursuit of preferred academic offerings for senior adults on campuses. The mature adult education seemed to array itself in perhaps three models this researcher chooses to call the Traditional Model and the Volunteer Model, and suggests a possible future for a Public Model. There are relatively few known research studies today about older adult learner education (age 50 or better) in post-secondary education studying in the Commonwealth of Virginia in institutional settings. Few researchers have investigated older adult education even from the medical benefits perspective or cognitive reasoning measurement. The American Association of Retired Persons (AARP) has some research data regarding the use of older adult education as a growth industry or marketing tool. Older adult learners as an aggregated group lack a voice and representation as a political interest group. Affluent well-educated and politically influential retirees will likely continue to dominate the Lifelong Learning Institutes. This study contributes to the

literature for older adult continuing academic education and illustrates the limited public policy on this subject.

In Chapter Three, the primary research question was, Are Lifelong Learning Institutions meeting needs in Virginia? The subsidiary research questions followed. What is the aging population density of LLIs in Virginia? What is the aging population within ten and twenty mile service area bands of the current service providers? What public policy choices may be needed for lifelong learning? The study is limited to academic providers and the limited research subjects are the campuses which host lifelong learning institutions that have academic curricula. The researcher presumes LLIs in Virginia will continue and grow. The importance of the study is to report a void in research by providing a baseline of current services and inform political discussion and the decision makers and may influence the shaping of policies and programs and their impact upon society. The study design is simple qualitative inductive inquiry. The data collection constitutes a baseline of LLIs in Virginia. The capacity phenomena are an indicator of stress on the location.

Chapter Four began with an overview of the thirteen primary study subjects arrayed upon a map of the Commonwealth of Virginia. Noticeably, all the Lifelong Learning Institutes are thriving within colleges and universities located along the major population corridors along Interstate routes I-95, I-81, and I-64. The discussion of the population and distribution data narrows to the ten miles and twenty miles concentric circles around each LLI. Many LLIs claim that about 90% of their membership lives within 10 miles of the LLI and the remainder within twenty miles. Figures 3 to 12

illustrate these market areas. Figure 13 serves to illustrate the well-distributed community colleges. Tables 2, 3, and 4 detail the senior population market statistics. Table 5 captures the origination characteristics of each LLI: the year established, if incorporated, 501(c)3 tax exempt status, and whether they have codified host agreements and liability insurance. Table 6 reports if host services are provided, if the host charges for those services, whether classes meet on campus, if the LLI sponsors scholarships for the host institution or other support to the host. Table 7 enumerates the 2003 and 2005 enrollment, membership and other fees. Table 8 describes the various semester characteristics of the LLIs. Table 9 illuminates other characteristics: payment of instructors, fundraising, field trips and the most notable indicator of efforts to control vigorous growth – establishment of a maximum capacity - and is followed by a brief discussion of this phenomena. See Appendices for a lengthy interview with LLI founders, and summaries of reports on learning while working, learning in retirement residences, and senior learning conferences.

The problem this researcher observed and anticipated is that older adult learner education beyond the legislated minimum requirements for adult basic literacy education is unevenly distributed among private and public agencies serving the aging. For the many relatively healthy adult learners whose attention and resources are not consumed by health and wealth concerns, their education desires will not nearly be met by the relatively small volume of programs available to meet adult learners' growing educational needs. See Table 10 which follows for the growth projection.

Table 10 – Growth Projections

LLI SITE	Age 60 and over		Percentage Change (Potential Growth Rate)	2005 Actual Enrollment	2030 Potential Enrollment (at 60 and Over Growth Rate)
	2003	2030			
ALRI-GMU	247,408	313,928	26.9%	517	656
CWA	22,991	60,492	163.1%	1500	3,947
MW-ES	18,634	85,869	360.8%	235	1,083
ODU-ILR	131,190	205,261	56.5%	670	1,048
JILL	20,218	17,306	-14.4%	526	450
OLLI-GMU	162,099	328,555	102.7%	680	1,378
CNU-LLS	70,748	201,108	184.3%	480	1,364
JMU-LLI	25,369	44,294	74.6%	589	1,028
LLI-NVCC	177,114	411,310	132.2%	95	221
LLI-CF	116,484	275,343	136.4%	130	307
LLI-NOVA	185,759	426,185	129.4%	335	769
SU-CLL	5,694	16,730	193.8%	100	294
OLLI-UR	116,484	275,343	136.4%	302	714

Table 10 – Growth Projections

Table 10 (above) illustrates the growth projections for each of the Lifelong Learning Institutes by comparing the population age 60 and over in each LLI's target area in 2003 to the projection in 2030. The percentage of change from 2003 to 2030 is calculated. The actual enrollment in 2005 is then multiplied by the projected percentage of change (potential growth rate) to estimate the potential for enrollment in 2030 if interest merely remains constant. The relatively small volume of programs currently available will not meet the growing projected needs of adult learners in the future even if interest levels remained flat.

The close correlation of previous academic achievement has repeatedly been proven a reliable indicator of continuing adult education (Cross, 1981, p. 80). The rising measure of previous education (Snyder, Hoffman & Geddes, 1997) of our aging citizenry, together with the rising percentage of older adults in our population, combines to portend the increasing need for continuing adult education opportunities across the Commonwealth of Virginia.

“The educational level of the older population is increasing. Between 1970 and 2001, the percentage that had completed high school rose from 28% to 70%. About 17% in 2001 had a bachelor’s degree or more. The percentage who had completed high school varied considerably by race and ethnic origin among older persons in 2001: 74% of whites, 63% of Asians and Pacific Islanders...51% of African-Americans, and 35% of Hispanics.” (A Profile of Older Americans: 2002. Sources: Current Population Survey, March Demographic Supplement, 2001 and related tables on the Census Bureau website; also: “educational Attainment in the United States (Update) March 2000,” p20-536).

The current capacity of the Lifelong Learning Institutes in Virginia, scarcely 6,000 student seats, is serving the current population of more than one million seniors in Virginia. If the demand merely remains constant while that target population continues to grow to double or more within 20 years, there will be a very substantial unmet demand for service. This need is presently indicated by the capacity phenomenon used by the LLIs to control growth. This need has already been observed by the commercial retirement living industry and they are already responding with dynamic new learning offerings for their active retirees.

As reported by Christy Pagans in the Guide to Retirement Living, Andrew Carle, Director of the Program in Assisted Living/Senior Housing Administration at George Mason University has coined a new term for the phenomenon arising around University

Based Retirement Communities (UBRCs). UBRCs near and on campuses that provide senior classes, facilities, sporting events, amenities, social, alumni, and musical events, often in coordination with a teaching university hospital and its services, are attractive retirement destinations. The marketers are capitalizing upon a faithful customer base of alumni and retired faculty loyalty that will last a lifetime. The UBRCs housing solutions may include houses, townhouses, apartments, assisted living facilities, and some have Alzheimer's service in their health care systems. Another example is arising at the College of William and Mary where the Commonwealth of Virginia has established a state agency called a "Center for Excellence in Aging" on the campus, and the community is building a new suburban hospital facility while the college has acquired the old urban hospital to enlarge the campus. Carle reports that Alvin Sanoff, The Learning Alliance (TLA) expert and former managing editor of U S news and World report, suggests that although there are no industry standards for enumerating these UBRC communities, there are probably less than 80 of them in the US enjoying varying degrees of affiliation and financial relationships with their host colleges and universities. Other examples of UBRCs as described by Carle include:

"Oak Hammock (University of Florida), The Village at Penn State (Penn State University), Lasell Village (Lasell College), Classic Residence by Hyatt (Stanford University), Kendal at Oberlin (Oberlin College), Green Hills (Iowa State University), and Longview (Ithaca College). Dozens of other UBRC's are currently under development or review, including one at George Mason University."

The psychological, social and physical benefits of LLIs are detailed in the research of Schaie (1994) and Selkoe (1992) and others. The psychological benefits include self esteem, personal enrichment and development, satisfaction of intellectual

stimulation needs, emotional fitness, prevention of mental decline “use it or lose it,” self-fulfillment, independence, belonging, empowerment, purpose, and self-worth. The social benefits include: sharing life stories, support from others, prevention of social isolation, friendship, companionship, relationship, interaction with others, and cohort understanding. The physical benefits include activity as opposed to being sedentary, health and fitness knowledge, fitness opportunities, fitness classes, and getting out of the house. These researchers confirm that deterioration is not inevitable. Selkoe claims, “Older persons who regularly engage in aerobic activity perform better on cognitive tests than do sedentary individuals of the same age with low aerobic fitness.” Shaie further claims, “Intellectual decline can be reversed by educational exercises and programs.”

“The Policy Book: AARP Public Policies 2003” on Education states that, “Older Americans should become visible supporters of school systems as well as a more integral part of the school community as volunteers and users of school facilities.” The AARP Policy Book further recommends, “States should increase learning opportunities for adults (in credit, noncredit and part-time programs) at community colleges, technical and vocational schools and other institutions of higher education. Support must include student financial aid for qualified adults, the opportunity to audit courses and public information programs that alert adults to educational opportunities.”

As Boomers surge into their golden years, they will supplant the influences of the “Greatest Generation” revered for surviving the Great Depression and World War II. Boomers are notorious for their entrepreneurial materialism and distrust of government. The Boomers and their echo will seek to protect their interests by exerting the power of

their numbers to set public policies by swinging the largest demographic bloc into action. Boomers will seek to protect their entitlements in Social Security and Medicare with voter strength over age 45 voting at rates over 66% (Vierck, 2004). Boomers have reshaped each life stage as they passed through it. Retirement will be revised as the Boomers shape it to suit themselves as they reinvent systems, structures, and organizations to respond to their needs, wants, and desires. Boomers will likely work longer, partly due to the delay in social security receipts. Boomers are not slaves to the traditional political party loyalties and frequently pursue special interest lobbies. Less than half the Boomers are subscribed to the two major political parties and many consider themselves 'independent.' This large demographic bloc is more distributed than concentrated, and more unpredictable. In addition to being vigorous voters, older people actively participate in civic positions, elections, and political discourse in legislatures, town councils, political action committees and organizations promoting their interests. The Census Bureau's current Population Survey reports that over 70% of older adults have graduated from high school, and within 10 years that rate will climb above 90%. Survey research closely correlates past education to desire for more education and predicts growth in the participation of older adults in continuing education for personal and social reasons, retraining for new 'retirement careers,' or honing skills to remain competitive in longer-lived careers.

Conclusions

The problem this researcher observed and anticipated is that older adult learner education, beyond the legislated minimum requirements for adult basic literacy education, is unevenly distributed among private and public agencies serving the aging. For the many relatively healthy adult learners whose attention and resources are not consumed by health and wealth concerns, their education desires will not nearly be met by the relatively small number of programs available to meet adult learners' growing educational needs.

The primary research question was: Are Lifelong Learning Institutions meeting needs in Virginia? The short answer is that the Virginia LLIs are meeting some needs in some locations. The absence of service in areas where there appears to be sufficient aging population density to support such services suggests a shortage of service. The maximum capacity factor reported in Chapter Four may indicate excess demand over services available in some locations.

The subsidiary research questions include the following: What is the aging population density at LLIs in Virginia? What is the aging population within ten and twenty mile service area bands of the current service providers? Detailed answers to the population and density questions are reported in Chapter Four. The short answer is that high volumes of aging persons are distributed in varying concentrations in numerous locations in Virginia. Service is available to small numbers of the aging population in

those areas where willing volunteers cooperate with willing hosts to generate Lifelong Learning Institutions.

What public policy options/support may be needed for lifelong learning?

Lifelong learning has flourished in Virginia with almost no public policy support. However, some providers are stressing the limits of their self-directed all volunteer organizations in locations with increasing populations. Some locations have no convenient services. Public policy options might include incentives to foster the establishment of LLIs where density suggests need. LLIs may require host resources until the LLI is sufficiently self-supporting to be self-maintaining and generate some measure of return on investment to its host (for example, a simple formula to return funds in excess of operating costs for nonprofit LLIs to the host, then, graduating to a formula to generate funds for the host). Minimal financial support and encouragement is needed to nurture an LLI where public facilities can accommodate its activities. LLI members are part-time users of existing facilities and usually do not want to own the real estate, perform maintenance, become legally obligated, etc., the same as any other club or extra-curricular activity on campus. Maximum volunteer effort is required to initiate and sustain a vibrant adult learning program. Such volunteer effort is routinely harnessed by hosts who cultivate alumni, family members, locals, politicians and other influencing forces. Over time, the LLI membership culture may generate a generous donor relationship with its host. Some LLI members have bequeathed their assets and made lump sum allocations to both the LLIs and their hosts. Host institutions benefit from the

community service volunteer hours contributed by LLI members and realize real dollars in cost avoidance for labor provided to the host by LLI volunteers.

The value of this research and these recommendations lies in its worth to inform the political decision making processes that support older adult learner education. Notably, Ratcliff (1985, p. 193) concluded, “As a policy is analyzed, more knowledge is gained about society. As more knowledge about society is gained, better policies can be written to solve society’s problems.” Wergin, in his dissertation, “A Model for the Evaluation of Policy in Organizations” (1973, pp. 144-147), proposes an enlarged role for policy evaluators: “An evaluator will not change the political process; he can only enhance it.” This researcher humbly hopes to have contributed to the process by adding to the knowledge about lifelong learners and the process.

Finally, Estes (2001, p. 236) encourages multidisciplinary projects to shape social policy on old age and aging...with attention to rebalancing individual aging vs. elderly in society, “...with emphasis on the ‘social,’ especially on the political, economic, and cultural conflicts and struggles that delineate the winners and losers of social policy.”

Recommendations/Public Policy Issues

In the future, public policy options might include incentives to foster the establishment of LLIs where density suggests need. The Virginia population density maps suggest that the Roanoke, Lynchburg and Martinsville metropolitan areas could all support local lifelong learning centers. This may well be the target market area of opportunity for the Virginia Technical Geriatric group.

The policy dilemmas for education in later life arise around the issues of who should provide and pay for education which is not designed for career enhancement or adult basic literacy education. Debates about the appropriation of public funds and resources applied to 'special interest groups' place sponsoring institutions on the defensive about their scant budgets. Hussin (1994, p. 267) observed, '...institutions, people in society were also dragged into the vortex of the swirling cycle of national priorities; in return, they were shaped by the priorities. This counteractive action-reaction relationship was a political process which involved many interests groups...[that] had to work for the benefits of the priorities.'

In the context of the many challenges facing American public service in choosing priorities, editors Ingraham and Romzek (1994) conclude: "...the American polity needs to identify the tasks of government that are indispensable to sustaining our commitment to democratic governance...governmental change and reform must be cognizant of democratic demands..." Public policy for provision of later life education is meager at best. In Merriam and Caffarella (1991, p. 157), they cite, "The sociological factors enter

with the support and resources provided by people's referent groups and society in general, which allow them to continue to grow and develop.. For example, providing Elderhostels and free tuition at higher-education institutions could be termed support resources for older adults in pursuing both specific and general areas of intellectual interest." Priorities compete for resources and rise or fall on policy and execution.

The community colleges already have a well-distributed infrastructure from which to provide both educational access – availability of higher education opportunities to all segments of society - *and* educational equity – balancing educational opportunities between different groups in society. The persistent inequity is that the kinds of non-credit courses desired by older adults are not subsidized by state and/or industry sponsors, making them more expensive than credit-bearing courses to elderly taxpayers and further separating the ends of the economic spectrum. Furthermore, the uneven distribution of lifelong learning opportunities among agencies serving the aging is illustrated in this study. Perhaps the community college network is a suitable LLI platform from which the growth to meet some of the needs of the growing golden population may be equitably served. In 2001, Malami made a similar finding in her research study, "An Open Door for the Baby Boomers: The Community College Prepares to Meet the Lifelong Learning Needs of an Aging Population." At the same time, the growth of the target commercial market will also expand to meet the blossoming needs for retirement housing, health care, financial management, travel and hospitality, and lifelong learners with the ability to pay for these services.

The last Baby Boomer turned 40 in 2004, when two Duke sociologists released their study debunking myths about the Boomer generation. Mary Elizabeth Hodges and Angela O. Rand reported that Boomers are “a diverse group of people whose experiences differ not only from those of previous generations, but also from each other.” Boomers are a very heterogeneous group and inequities in wealth and income may be expected to increase as Boomers age and necessitate public policy accommodations for low wages, less savings, job instability and higher risk of unemployment, even while they continue to work longer and their health deteriorates with age. About 12-15% of Boomers are immigrants and the percentages of Hispanic and Asian immigrants have increased dramatically. “Diversity has not led to equality.” Ethnic classes, racial and educational inequality persist despite Boomers’ reputation, “often described as the best-educated generation in history.”

On February 22, 2005, Merrill Lynch released, “The New Retirement Survey” that “reveals how Baby Boomers will transform retirement.” Guided by author and gerontologist, Dr. Ken Dychtwald, this collaboration with Harris Interactive and Age Wave relates a new model of retirement reinvented by Boomers cycling between periods of work and leisure. This survey reports that, “67% [f Boomer retirees] assert that continued mental stimulation and challenge is what will motivate them to stay in the game (i.e., working)” and “76% of [over 76 million] Boomers intend to keep working (at least part time) and earning in retirement, on average they expect to “retire” from their current job/career at around 64 and then launch into an entirely new job or career.” It

sounds to this researcher like millions of lifelong learners are eager to learn a new avocation.

From the perspective of the sponsoring institutions, public policy support from state legislatures than allows colleges and universities the economic encouragement to accommodate senior students will more than pay for itself. In 2005, the Virginia General Assembly appropriated \$50 million for two colleges to buy old urban hospital real estate as extensions of their campuses, including facilities use by their lifelong learners.

For example, in 2005 alone, the Christopher Wren Association (CWA) of the College of William and Mary (W&M) made \$80,000. in direct cash donations to its college from the nonprofit CWA organization account, irrespective of the individual and alumni gifts routinely collected for scholarships and capital fund drives. College accountants were unwilling to allow this researcher to probe into the extent of individual gifts received by W&M from members of the CWA. An administrator at the University of Richmond admitted that its lifelong learners were generous donors who auditors trace through multiple systems. The 1993 Virginia General Assembly legislation to encourage adult education authorized university fundraisers access to the names/address information compiled by the hosts (reported in detail in Chapter Two). These gifts and donations are met by the minimal expectation of a few hours per week use of meeting spaces that otherwise are unused and state publicly-funded hosts are allowed to count the use rate of LLI members into their annual accounting to the state for facility use funding to get more money authorized for campus facilities. For example, in the case of CWA, W&M may claim facility use by 1500 LLI members. The manpower provided by thousands of

volunteer hours from senior learners is also a cost avoidance factor for the host during registration, commencement, and other labor intensive events.

It is more difficult to quantify, but host institutions may ultimately be able to claim to provide both educational access – availability of higher education opportunities to all segments of society - *and* educational equity – balancing educational opportunities between different groups in society by offering a more distributed network of Lifelong Learning Institutes.

“Grow old along with me, the best is yet to be.” (Robert Browning, 1812-1889)

Other Observations for Future Studies

Some retirees experience a “loss of identity” upon retirement and return to school in search of their next persona. Jarvis says, “In retirement we have to learn to be free (not bound by a structured self image) – but the problem is that we might not want to be free or that we fear freedom.” (Jarvis, 2001 p. 71) for example, as one who identifies himself by his job or occupation. Jarvis (2001, p. 74) continues, “We all have to learn to be free in a world that lies beyond work....Who then are they [you] going to be after they [you] are retired?” An observation for future studies on the transition into LLIs from an individual perspective and on the individual value of this experience will be worthy of study.

An important disclaimer is noted in Schindele’s (1997, p.120) analysis notes, social and political values are dynamic – changing over time and from place to place and perspective changes the view through the lens. Lifelong learners will need to be studied repeatedly over time and in different contexts to complete the view and modify it as it evolves. Future comparative studies on the national and global scale may confirm these findings.

TERMS

Baby Boomers – those born between 1946 and 1964

Educational access – availability of higher education opportunities to all segments of society

Educational equity – balancing educational opportunities between different groups in society

Educational gerontology – the study and practice of instructional endeavors for and about aging and aging individuals (Peterson, 1976, p. 62)

Fourth Age – a phase of life that has come to be known as decline until death following the “third age” (see below)

Lifelong learning – formal, informal, and self-directed learning throughout all the phases of life beyond initial fundamental traditional education (usually after age 25)

Lifelong Learning Institutes (LLIs) – the term endorsed in 2002 as that preferred by the Elderhostel Institute Network (EIN) for its members learning in retirement (however, the independently operated organizations may choose to continue in their organizational names of choice)

Policy – a course of action followed by an institution/government

Self-directed learning – the learner assumes responsibility in the learning process

Third Age – a phase of life that has come to be known as that period of active involved retirement (variously ages 60s – 70s, also called the second middle age by Manheimer) after retirement from the workforce, including the period of continuing

education described in this study, free of domestic responsibilities and able to pursue personal satisfaction.

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WEBSITES FOR ADULT LEARNING

www.aoa.dhhs.gov	Administration on Aging
www.adultlearnerlink.com	Adult Learner Link
www.adultlearnernavigator.com	Adult Learner Navigator
www.AgeWave.com	Age Wave
www.agingresearch.org	Aging Research
arlingtonlri.gmu.edu	Arlington Learning in Retirement Institute at GMU
www.acheinc.org	Assn for Continuing Higher Education ACHE
www.aghe.org	Assn for Gerontology in Higher Education AGHE
www.alirow.org	Assn of Learning in Retirement Org West ALIROW
www.alz.org	National Alzheimer's Association
www.alz-nca.org	Alzheimer's Association – National Capital Area
www.aaace.org	Am Assn of Adult & Continuing Education AAACE
www2.aahsa.org	American Association of Homes Services for the Aging
www.americangeriatrics.org	American Geriatrics Society
www.asaging.org/learn	Am Society on Aging, Lifetime Education and Renewal Network LEARN
www.aasc.org	Appalachian Agency for Senior Citizens, Inc.
www.aaace.org	Association of Adult And Continuing Education (AAACE)
www.aarp.org	American Association of Retired Persons (AARP)
www.aacc.nche.edu	American Association of Community Colleges
www.asaging.org	American Society on Aging

www.acheinc.org	Association for Continuing Higher Education
www.aghe.org	Association for Gerontology in Higher Education
www.alirow.org	Association of Learning in Retirement Organization of the West
www.bev.net	Blacksburg Electronic Village
www.cael.org	Council of Adult and Experiential Education
www.wm.edu/CWA	Christopher Wren Association for Lifelong Learning
www.vipnet.org	Commonwealth of Virginia
www.cael.org	Council of Adult and Experiential Education
www.eldercare.gov	Eldercare Locator Directory
www.elderhostel.org	Elderhostel National Headquarters
www.elderhostel.org/ein	Elderhostel Institute Network (EIN)
www.jmc.mwc.edu/elder	ElderStudy at Mary Washington College
www.caregiver.org	Family Caregiver Alliance
www.geron.org	Gerontological Society of America
www.iog.wayne.edu	GeroWeb-Wayne State Institute of Gerontology
www.grandsplace.com	GrandsPlace
www.graypanthers.org	Gray Panthers
www.healthfinder.gov	U S Dept Health & Human Services
www.lions.odu.edu	Institute for Learning in Retirement at ODU
www.avenue.org/adulted	Jefferson Area Board for Aging
www.jilluva.org	Jefferson Institute for Lifelong Learning (JILL) at UVA

www.lcaa.org	Lake County Area Agency on Aging
www.lcao.org	Leadership Council of Aging Organizations
www.gmu.edu	Learning in Retirement Institute at GMU
www.brandermillwoods.com	Lifelong Learning Institute in Chesterfield County, VCU, VA Center on Aging
www.jmu.edu/socwork/lli	Lifelong Learning Institute at JMU
www.nvcc.edu/manassas	Lifelong Learning Institute at NVCC, Manassas
www.cnu.edu/lls	Lifelong Learning Society at CNU
www.nvcc.edu/annandale	Lifetime Learning Institute of No VA LLI/NOVA
www.loaa.org	LOA-Area Agency on Aging, Inc.
www.n4a.org	National Association of Area Agencies on Aging
www.benefitscheckup.org	National Council on Aging
www.ncoa.org	
www.nfcacares.org	National Family Caregivers Association
www.owl.org	National Older Women's League
www.highereducation.org	National Center for Public Policy and Higher Education
www.ncpssm.org	National Committee to Preserve Social Security and Medicare
www.nih.gov/nia	National Institute on Aging
www.msv.org	Medical Society of Virginia
www.medicarerights.org	Medicare Rights Center
www.meoc.org	Mountain Empire Older Citizens, Inc.
www.oasisnet.org	Older Adult Services Information Systems Institutes
www.owl-national.org	Older Women's League

www.optionscorp.com	Options for Senior America
www.paainc.org	Peninsula Agency on Aging, Inc.
www.seniornet.org	SeniorNet
www.score.org	Service Corps of Retired Executives
www.su.edu/cont-ed	Shenandoah University College for Lifelong Learning
www.shepherdcenters.org	Shepherd's Centers
www.spry.org	SPRY Foundation
www.professorbeyer.com	St. Mary's U, School of Law, San Antonio, TX
www.ppionline.org	Progressive Policy Institute: Defining the Third Way
www.redhatsociety.org	Red Hat Society
www.seniorjournal.com	Senior Journal
www.SeniorNavigator.com	Senior Navigator
www.ssa.gov	Social Security Administration
www.ssseva.org	Senior Services of Southeastern VA
www.shentel.net/elderweb	Shenandoah Valley Elderweb
www.thirdage.com	Third Age
www.unitedadultlearners.org	United Lifelong Learners Association
www.census.gov	U.S. Census Bureau
www.va.gov	U.S. Department of Veterans Affairs
www.worldu3a.org	University of the Third Age
www.ucea.edu	University Continuing Education Association
www.vaaaa.org	VA Assn. of Area Agencies on Aging

www.vcu.edu

www.vcu.edu/VCoA

www.aging.state.va.us

www.yesvachoice.com

www.vhca.org

www.virginia.edu

www.ahec.vcu.edu

www.volunteermatch.org

Virginia Commonwealth University (VCU)

Virginia Center on Aging (VCoA) (VCU)

Virginia Department for the Aging

Virginia Energy Choice

Virginia Health Care Association

Virginia Health Policy Center

Virginia Statewide AHEC Program

Volunteer

AREA AGENCIES ON AGING IN VIRGINIA

Planning & Service

<u>Area</u>	<u>Agency</u>	<u>Jurisdictions Served</u>
1	MOUNTAIN EMPIRE OLDER CITIZENS, INC. 1-A Industrial Park Rd PO Box 888 Big Stone Gap, VA 24219-0888 Marilyn Pace Maxwell, Executive Director Phone: 276-523-4202 Fax: 276-523-4208 Toll-free: 1- 800-252-6362	<i>Counties of Lee, Scott, Wise. City Of Norton.</i> Agency e-mail: meoc@meoc.org Website Address: http://www.meoc.org/
2	APPALACHIAN AGENCY FOR SENIOR CITIZENS, INC. 216 College Ridge Rd, Wardell Industrial Park P.O. Box 765 Cedar Bluff, VA 24609-0765 Diana Wallace, Executive Director Phone: 276-964-4915 or 963-0400 Fax: 276-963-0130 Toll-free: 1-800-656-2272	<i>Counties of Buchanan, Dickenson, Russell, and Tazewell.</i> Agency e-mail: aasc@aasc.org Website Address: http://www.aasc.org/
3	DISTRICT THREE SENIOR SERVICES 4453 Lee Highway Marion, VA 24354-4269 Mike Guy, Executive Director Phone: 276-783-8158 Fax: 276-783-3003 Toll-free: 1-800-541-0933	<i>Counties of Bland, Carroll, Grayson Smyth, Washington, and Wythe. Cities of Bristol and Galax</i> Agency e-mail: district-three@smyth.net Website Address: http://www.district-three.org
4	NEW RIVER VALLEY AGENCY ON AGING 141 E Main St Pulaski, VA 24301-5029 Debbie Palmer, Executive Director Phone: 540-980-7720 or 639-9677 Fax: 540-980-7724 Toll-free: 1-866-260-4417	<i>Counties of Floyd, Giles, Montgomery, and Pulaski. City of Radford</i> Agency e-mail: nrvaoa@psknet.com Website address: N/A

**Planning
& Service**

Area	Agency	Jurisdictions Served
5	LOA - AREA AGENCY ON AGING, INC. 706 Campbell Ave., SW P.O. Box 14205 Roanoke, VA 24038-4205 Susan Williams, Executive Director Phone: 540-345-0451 (Roanoke Valley) Alleghany Highlands: (540) 962-0465, Botetourt County: (540) 966-1094 & (540) 884-2892 Craig County: (540) 864-6031 Fax: 540-981-1487	<i>Counties of Allegheny, Botetourt, Craig, and Roanoke Cities of Covington, Roanoke and Salem</i> Director e-mail: sbwloa@loaa.org Agency e-mail: info@loaa.org Website Address: http://www.loaa.org/
6	VALLEY PROGRAM FOR AGING SERVICES, INC. 325 Pine Avenue P.O. Box 817 Waynesboro, VA 22980-0603 Paul Lavigne, Executive Director Phone: 540-949-7141 Fax: 540-949-7143 Toll-free: 1-800-868-8727	<i>Counties of Augusta, Bath, Highland Rockbridge, and Rockingham. Cities of Buena Vista, Harrisonburg, Lexington, Staunton, and Waynesboro.</i> Director e-mail: paul@vpas.info Agency e-mail: vpas@ntelos.net Website Address:
7	SHENANDOAH AREA AGENCY ON AGING, INC. 207 Mosby Lane Front Royal, VA 22630-3029 Helen M. Cockrell, Executive Director Phone: 540-635-7141 Fax: 540-636-7810 Toll-free: 1-800-883-4122	<i>Counties of Clarke, Frederick, Page, Shenandoah, and Warren. City of Winchester.</i> Director e-mail: helen.cockrell@shenandoahaaa.com Agency e-mail: saaa@shenandoahaaa.com Website Address: http://www.shenandoahaaa.com
8A	ALEXANDRIA OFFICE OF AGING and ADULT SERVICES 2525 Mount Vernon Avenue - Unit 5 Alexandria, VA 22301-1159 MaryAnn Griffin, Director Phone: 703-838-0920 Fax: 703-838-0886 Website: http://ci.alexandria.va.us/dhs/community_partners/aging_netwk.html	<i>City of Alexandria.</i> e-mail: MaryAnn.Griffin@ci.alexandria.va.us

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Area	Agency	Jurisdictions Served
8B	ARLINGTON AGENCY ON AGING c/o Department of Human Services 3033 Wilson Blvd, Suite 700B Arlington, VA 22201-3843 Terri Lynch, Director Director e-mail: tlynch@co.arlington.va.us Phone: 703-228-1700 Agency e-mail: ArlAAA@co.arlington.va.us Fax: 703-228-1148 Website: http://www.co.arlington.va.us/dhs/services/aging/aaa/index.htm	<i>County of Arlington.</i>
8C	FAIRFAX AREA AGENCY ON AGING 12011 Government Center Pkwy Ste 708 Fairfax, VA 22035-1104 Grace Starbird, Executive Director Phone: 703-324-5411 Director e-mail: grace.starbird@fairfaxcounty.gov Fax: 703-449-8689 Website Address: http://www.fairfaxcounty.gov/service/aaa/homepage.html Toll-Free: 1-866-503-0217	<i>County of Fairfax. Cities of Fairfax and Falls Church.</i>
8D	LOUDOUN COUNTY AREA AGENCY ON AGING 215 Depot Court SE, 2 nd Floor Leesburg, VA 20175-3017 Anne Edwards, Administrator Phone: 703-777-0257 Director e-mail: aedwards@co.loudoun.va.us Fax: 703-771-5161 Website address: http://www.co.loudoun.va.us/prcs/aaa/index.htm	<i>County of Loudoun.</i>
8E	PRINCE WILLIAM AREA AGENCY ON AGING 7987 Ashton Avenue, Suite 231 Manassas, VA 20109-8212 Lin Wagener, Director Phone: 703-792-6400 Director e-mail: lwagener@pwcgov.org Fax: 703-792-4734 Website Address: http://www.pwcgov.org/aoa/default.htm	<i>County of Prince William. Cities of Manassas and Manassas Park.</i>

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Area	Agency	Jurisdictions Served
9	RAPPAHANNOCK-RAPIDAN COMMUNITY SERVICES BOARD 15361 Bradford Road P.O. Box 1568 Culpepper, VA 22701-1568 Brian D. Duncan, Executive Director Phone: 540-825-3100 Fax: 540-825-6245 TDD: 540-825-7391 Website Address: N/A	<i>Counties of Culpepper, Fauquier Madison, Orange, and Rappahannock.</i> Director e-mail: bduncan@rrcsb.org Agency e-mail: rrcsb@rrcsb.org
10	JEFFERSON AREA BOARD FOR AGING 674 Hillsdale Drive, Suite 9 Charlottesville, VA 22901-1799 Gordon Walker, CEO Phone: 434-817-5222 Fax: 434-817-5230 Senior Centers: Fluvanna Co: (434) 842-3693, Greene Co: (434) 985-2869, Louisa Co (540) 967-4433, Nelson Co (434) 263-7155	<i>Counties of Albemarle, Fluvanna, Greene, Louisa, and Nelson. City of Charlottesville.</i> Director e-mail: gwalker@jabacares.org Agency e-mail: jaba@jabacares.org Website Address: http://www.jabacares.org
11	CENTRAL VIRGINIA AREA AGENCY ON AGING, INC. 3024 Forest Hills Circle Lynchburg, VA 24501-2312 Dan Farris, Executive Director Phone: 434-385-9070 Fax: 434-385-9209	<i>Counties of Amherst, Appomattox, Bedford, and Campbell. Cities of Bedford and Lynchburg.</i> Director e-mail: dfarris@cvaaa.com Agency e-mail: cvaaa@cvaaa.com Website Address: http://www.cvaaa.com
12	SOUTHERN AREA AGENCY ON AGING, INC. 433 Commonwealth Blvd E, Ste. A Martinsville, VA 24112-2020 Teresa Carter, Executive Director Phone: 276-632-6442 Fax: 276-632-6252 Toll-free: 1-800-468-4571	<i>Counties of Franklin, Henry, Patrick, and Pittsylvania. Cities of Danville and Martinsville.</i> Agency e-mail: saaa@southernaaa.org Director e-mail: tcarter@southernaaa.org Website Address: http://www.southernaaa.org/

**Planning
& Service**

Area	Agency	Jurisdictions Served
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|---|---|--|
| 13 LAKE COUNTRY AREA AGENCY ON AGING | 1105 West Danville Street
South Hill, VA 23970-3501
Ed Taylor, Executive Director
Phone: 434-447-7661
Fax: 434-447-4074
Toll-free: 1-800-252-4464 | <i>Counties of Brunswick,
Halifax, and Mecklenburg.</i>

Agency e-mail: lakecaaaa@lcaaaa.org
Website Address: http://www.lcaaaa.org/ |
| 14 PIEDMONT SENIOR RESOURCES AREA AGENCY ON AGING, INC. | Inverness Rd & Rt 624
P.O. Box 398
Burkeville, VA 23922-0398
Ronald Dunn, Executive Director
Phone: 434-767-5588
Fax: 434-767-2529
Toll-free: 1-800-995-6918 | <i>Counties of Amelia, Buckingham,
Charlotte, Cumberland,
Lunenburg, Nottoway, and Prince Edward.</i>

Agency e-mail: psraaaa@hovac.com
Website Address: N/A |
| 15 SENIOR CONNECTIONS
The Capital Area Agency On Aging, Inc. | 24 East Cary Street
Richmond, VA 23219-3796
Dr. Thelma Bland Watson, Executive Director
Phone: 804-343-3000
Fax: 804-649-2258
Toll-free: 1-800-989-2286
Website Address: http://www.seniorconnections-va.org | <i>Counties of Charles City,
Chesterfield, Goochland,
Hanover, Henrico,
New Kent and Powhatan.
City of Richmond.</i>

Director e-mail: twatson@youraaa.org |
| 16 RAPPAHANNOCK AREA AGENCY ON AGING, INC | 171 Warrenton Rd
Fredericksburg, VA 22405-1343
Carol Davis, Executive Director
Phone: 540-371-3375
Fax: 540-371-3384
Website Address: http://raaaa.home.infionline.net/
Toll-free: 1-800-262-4012 (Virginia only) | <i>Counties of Caroline,
King George, Spotsylvania,
and Stafford.
City of Fredericksburg.</i>

Agency e-mail: raaaa@infionline.net |

**Planning
& Service**

<u>Area</u>	<u>Agency</u>	<u>Jurisdictions Served</u>
17/18 BAY AGING	5306 Old Virginia St P.O. Box 610 Urbanna, VA 23175-0610 Allyn Gemerek, President Phone: 804-758-2386 Fax: 804-758-5773 Toll-free: 1-866-758-2386	<i>Counties of Essex, Gloucester, King and Queen, King William, Lancaster, Mathews, Middlesex, Northumberland, Richmond and Westmoreland</i> Director e-mail: ksheldon@bayaging.org Agency e-mail: rharris@bayaging.org Website Address: http://www.bayaging.org/
19 CRATER DISTRICT AREA AGENCY ON AGING	23 Seyler Drive Petersburg, VA 23805-9243 David Sadowski, Executive Director Phone: 804-732-7020 Fax: 804-732-7232	<i>Counties of Dinwiddie, Greensville, Prince George, Surry, and Sussex. Cities of Colonial Heights, Emporia, Hopewell, and Petersburg.</i> Agency e-mail: craterdist@aol.com Website Address: http://www.cdaaa.org
20 SENIOR SERVICES OF SOUTHEASTERN VIRGINIA	Interstate Corporate Center, Bldg 5 6350 Center Drive, Suite 101 Norfolk, VA 23502-4101 John Skirven, Executive Director Director e-mail: jskirven@ssseva.org , sevamp1@cox.net Phone: 757-461-9481*	<i>Counties of Isle of Wight and Southampton Cities of Chesapeake, Franklin, Norfolk, Portsmouth, Suffolk and Virginia Beach.</i> Agency e-mail: services@ssseva.org *Chesapeake, Norfolk, Portsmouth & Virginia Beach Franklin: 757-569-8206, Isle of Wight: 757-357-4050, Southampton: 757-653-2105, S Suffolk: 757-934-1661 Ombudsman Toll-Free Phone: 1-800-766-8059 FAX: 757-461-1068 Website Address: http://www.ssseva.org/

**Planning
& Service**

Area	Agency	Jurisdictions Served
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|-----------|---|---|
| 21 | PENINSULA AGENCY ON AGING
739 Thimble Shoals Blvd, Executive Center
Building 1000, Suite 1006
Newport News, VA 23606-3585
William Massey, Executive Director
Phone: 757-873-0541
Fax: 757-873-1437
Toll-free for Peninsula Area Residents: 757-873-0541 | <i>Counties of James City and York.
 Cities of Hampton,
 Newport News, Poquoson and Williamsburg.</i>
Director e-mail: ceo@paainc.org
Agency e-mail: information@paainc.org
Website Address: http://www.paainc.org/ |
| 22 | EASTERN SHORE AREA AGENCY ON AGING
 COMMUNITY ACTION AGENCY, INC.
36282 Lankford Hwy
Colonial Square – Suite 13-D
P.O. Box 415
Belle Haven, VA 23306-0415
Whitesy Banks, Executive Director
Phone: 757-442-9652
Fax: 757-442-9303
Toll-Free 1-800-452-5977 | <i>Counties of Accomack and
 Northampton.</i>
Agency e-mail: esaaacaa@intercom.net
Website Address: N/A |

Virginia Department for the Aging

1600 Forest Avenue, Suite 102
 Richmond, VA 23229
 Phone: 804-662-9333
 Fax: 804-662-9354
 Toll-free: 1-800-552-3402
 Website Address: www.aging.state.va.us

5/10/2006/Kevin F. Byrnes

OTHER AGENCIES SERVING THE AGING

Alcohol Hotline	1-800-252-6465
Alzheimer's Association	1-800-272-3900
Air Ambulance	1-800-631-6565
American Council of Blind	1-800-424-8666
American Lung Association	1-800-283-7800
American Speech, Lung and Hearing Association	1-800-638-8255
Better Hearing Institute	1-800-327-9355
Consumer Product Safety	1-800-638-2772
Elder Care Locator	1-800-677-1116
Elderhostel	1-877-426-8056
Federal Tax	1-800-829-1040
Fuel Assistance	1-800-552-3431
Incontinence	1-800-237-4666
Lung Line	1-800-222-5864
Medicare Beneficiary Help Line	1-800-545-3814
Medicare Claim	1-800-552-3423
Medicare Fraud	1-800-368-5779
Miss Utility	1-800-552-7001
Motor Vehicles, Department of	1-866-368-5463
National Headache Foundation	1-800-843-2256
National Institute of Neurological Disorders & Stroke	1-800-352-9424
National Rehabilitation Services	1-800-346-2742
Operation Blessing	1-800-730-2537
Physicians Referral	1-800-736-8272
Poison Control Hotline	1-800-222-1222
Social Security Hotline	1-800-772-1213
VA State Employees and Agencies	1-800-422-2319
Veterans Affairs	1-800-827-1000
Veterans Complaints	1-800-368-5844
Virginians with Disabilities	1-800-552-3962
Virginia Center on Aging, VCU	1-804-828-1525
Virginia Department for the Aging	1-800-552-3402

Virginia Community College System (VCCS) Information

Virginia Community College System

Dr. Glenn DuBois, Chancellor

101 North 14th Street 15th Floor, Richmond, Virginia 23219

Telephone: (804) 819-4901 Facsimile: (804) 819-4760 Voice/TDD: (804) 371-8504

Blue Ridge

Dr. James R. Perkins, President

Post Office Box 80

Weyers Cave, Virginia 24486

Telephone:

Voice/TDD:

FAX:

Toll free in Virginia - 1-888-750-2722

Central Virginia

Dr. Darrel W. Staat, President

3506 Wards Road

Lynchburg, Virginia 24502

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Adm. Bldg. FAX:

FAX:

Toll free in Virginia - 1-800-562-3060

Dabney S. Lancaster

Dr. Richard R. Teaff, President

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1000 Dabney Drive

Clifton Forge, Virginia

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Voice/TDD:

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Virginia Community College System (VCCS) Information

Danville

Dr. B. Carlyle Ramsey, President

1008 S. Main Street
 Danville, Virginia 24541
 Telephone: 434-799-1111
 Voice/TDD: 434-799-1111
 FAX: 434-799-1111

Eastern Shore

Dr. Richard E. Jenkins, President

29300 Lankford Highway
 Melfa, Virginia 23410
 Telephone: 434-799-1111
 Voice/TDD: 434-799-1111
 FAX: 434-799-1111

Germanna

Dr. Francis S. Turnage, President

Locust Grove Campus
 2130 Germanna Highway
 Locust Grove, Virginia 22508
 Telephone: 434-799-1111
 Voice/TDD: 434-799-1111
 FAX: 434-799-1111

Fredericksburg Area Campus
 10000 Germanna Point Drive
 Fredericksburg, Virginia 22408
 Telephone: 434-799-1111
 Voice/TDD: 434-799-1111
 FAX: 434-799-1111

J. Sargeant Reynolds

Dr. Gary L. Rhodes, President

College Staff
 Post Office Box 85622
 Richmond, Virginia 23285-5622
 Telephone: 434-799-1111
 FAX: 434-799-1111

Virginia Community College System (VCCS) Information

Downtown Campus

Post Office Box 85622
Richmond, Virginia 23285-5622
Telephone: (800) 552-3490
Voice/TDD: (800) 552-3490
FAX: (800) 552-3490

Parham Road Campus

Post Office Box 85622
Richmond, Virginia 23285-5622
Telephone: (800) 552-3490
FAX: (800) 552-3490

Western Campus

Post Office Box 85622
Richmond, Virginia 23285-5622
Telephone: (800) 552-3490
FAX: (800) 552-3490

John Tyler

Dr. Marshall W. Smith, President

Chester Campus

13101 Jefferson Davis Highway
Chester, Virginia 23831
Telephone: (800) 552-3490
Voice/TDD: (800) 552-3490
FAX: (800) 552-3490
Toll free number in VA - 1-800-552-3490

Midlothian Campus

601 Charter Colony Parkway
Midlothian, Virginia 23113
Telephone: (800) 552-3490
FAX: (800) 552-3490
(Please send all mail to Chester)

Virginia Community College System (VCCS) Information

Lord Fairfax

Dr. John J. "Ski" Sygielski, President

Middletown Campus

173 Skirmisher Lane

Middletown, Virginia 22645

Telephone:

Voice/TDD:

FAX:

Toll free number in VA - 1-800-906-5322

Fauquier Campus

6480 College Street

Warrenton, Virginia 20187-8820

Telephone:

Voice/TDD:

FAX:

Mountain Empire

Dr. Terrance Suarez, President

3441 Mountain Empire Road

Big Stone Gap, Virginia 24219

Telephone:

FAX:

New River

Dr. Jack M. Lewis, President

PO Box 1127

Dublin, Virginia 24084

Telephone:

Voice/TDD:

FAX:

Virginia Community College System (VCCS) Information

Northern Virginia

Dr. Robert Templin, President

College Staff

4001 Wakefield Chapel Road

Annandale, Virginia 22003

Telephone:

Voice/TDD:

FAX:

Alexandria Campus

3001 N. Beauregard Street

Alexandria, Virginia 22311

Telephone:

Voice/TDD:

FAX:

Annandale Campus

8333 Little River Turnpike

Annandale, Virginia 22003

Telephone:

Voice/TDD:

FAX:

Loudoun Campus

1000 Harry Flood Byrd Highway

Sterling, Virginia 22170

Telephone:

Voice/TDD:

FAX:

Manassas Campus

6901 Sudley Road

Manassas, Virginia 20109

Telephone:

Voice/TDD:

FAX:

Virginia Community College System (VCCS) Information

Medical Education Center

6699 Springfield Center Drive
Springfield, Virginia 22150
Telephone
Voice/TDD:
Fax:

Woodbridge Campus

15200 Neabsco Road
Woodbridge, Virginia 22191
Telephone:
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Patrick Henry

Dr. Max F. Wingett, President

Post Office Box 5311
Martinsville, Virginia 24115
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Pres. FAX: (304) 221-1123
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Paul D. Camp

Dr. Douglas Boyce, President

Franklin Campus

Post Office Box 737
Franklin, Virginia 23851
Telephone
Voice/TDD:
FAX

Oliver Kermit Hobbs Campus

271 Kenyon Road
Suffolk, Virginia 23434
Telephone:
Voice/TDD
FAX:

Virginia Community College System (VCCS) Information

Piedmont Virginia

Dr. Frank Friedman, President

501 College Drive
 Charlottesville, Virginia 22902-7589
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Rappahannock

Dr. Elizabeth H. Crowther, President

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 12745 College Drive
 Glenns, Virginia 23149
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 Voice/TDD
 FAX: (

Warsaw Campus
 52 Campus Drive
 Warsaw, Virginia 22572
 Telephone:
 Voice/TDI
 FAX:)

Southside Virginia

Dr. John J. Cavan, President

Christanna Campus
 109 Campus Drive
 Alberta, Virginia 23821
 Telephone
 Voice/TDE
 FAX

John H. Daniel Campus
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 Keysville, Virginia 23947
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 FAX: (

Virginia Community College System (VCCS) Information

Southwest Virginia

Dr. Charles R. King, President

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Voice/TDD

FAX

Thomas Nelson

Dr. Charles A. Taylor, President

Hampton Campus

Post Office Box 9407

Hampton, Virginia 23670

Telephone:

Voice/TDD

FAX

Williamsburg Campus

161-C John Jefferson Square

Williamsburg, Virginia 23185

Telephone:

FAX:

Tidewater

Dr. Deborah M. DiCrocce, President

College Staff

121 College Place

Norfolk, Virginia 23510

Telephone:

Voice/TDD: (

FAX:

Chesapeake Campus

1428 Cedar Road

Chesapeake, Virginia 23320

Telephone

Voice/TDD:

FAX

Virginia Community College System (VCCS) Information*Thomas W. Moss, Jr. - Norfolk Campus*

300 Granby Street
Norfolk, Virginia 23510
Telephone:
Voice/TDD:
FAX:

Portsmouth Campus

7000 College Drive
Portsmouth, Virginia 23703
Telephone:
Voice/TDD: 4
FAX:

Virginia Beach Campus

1700 College Crescent
Virginia Beach, Virginia 23456
Telephone:
Voice/TDD:
FAX: (

Virginia Community College System (VCCS) Information**Virginia Highlands****Dr. F. David Wilkin, President**

Post Office Box 828

Abingdon, Virginia 24212

Telephone

FAX:

Virginia Western**Dr. Robert H. Sandel, President**

Post Office Box 14007

Roanoke, Virginia 24038-4007

Telephone

Voice/TDD:

FAX:

Wytheville**Dr. Ann Alexander, President**

1000 East Main Street

Wytheville, Virginia 24382

Telephone:

FAX

APPENDICES

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APPENDIX A

LLI Questionnaire

Full Name and commonly used (abbreviation)

Host college or university

Year established Are you incorporated (Y/N) 501(C)(3) (Y/N)

Do you have a written agreement with host (Y/N)

Do you have liability insurance (Y/N)

Does your host provide services/overhead (Y/N) Types

Do they charge you for these services (Y/N) Explain (if need)

Is your office staffed by (volunteers/paid employees/both)

Do you meet on campus (Y/N) If not where

Do you provide scholarships to your host (Y/N)

Other ways you provide support to your host

Number of members (full) (assoc.)

Number of semesters/programs per year

How long are your semesters/programs (weeks)

Is each semester divided (Y/N) How

Do you meet in the summer (Y/N) _____

How long is the session How many courses do you offer in the summer

(Continued on back)

LLI Questionnaire (cont.)

Fees:

Membership Fee: Full Year Fall Only Spring Only Summer Only

Membership Categories:

Full Member \$_____ \$_____ \$_____ \$_____

Associate Member \$_____ \$_____ \$_____ \$_____

If form is not applicable explain:

Is there a separate charge for classes (Y/N) If so how much? (average if not constant)\$_____

Please Explain:

Who facilitates your classes ? (circle the applicable)

Volunteer members Outside experts Current faculty Retired Faculty

Do you pay facilitators (Y/N) If so how much ? If not, how do you compensate or thank them ?

Do you engage in any fundraising on your own or through your host ? (Y/N)
Examples

Do you offer any one day field trips (Y/N) _____

Do you offer any multi-day field trips (Y/N) _____

Additional questions added after discovery of the surprise phenomena of maximum capacity ('max cap') established in some LLIs:

Do you maintain a waiting list of applicants?

How many?

How long do they wait to be admitted?

APPENDIX B

LLIs in Virginia

Arlington Learning in Retirement Institute (ALRI-GMU)
George Mason University & Arlington Public Schools Adult Education
2801 Claredon Blvd., #306
Arlington, VA 22201
(703) 228-2144
Fax (703) 228-7205
alri@gmu.edu
www.arlingtonlri.gmu.edu

Christopher Wren Association (CWA)
The College of William and Mary
P. O. Box 8795
Williamsburg, VA 23187-8795
(757) 221-1079
Fax (757) 221 3146
www.wm.edu/CWA
nhkaus@wm.edu

ElderStudy
Mary Washington College (MWC-ES)
1301 College Avenue
Fredericksburg, VA 22401
(540) 654-1769
www.jmc.mwc.edu/elder/index.htm
elderstu@mwc.edu

Institute for Learning in Retirement (ODU-ILR)
Old Dominion University
1881 University Drive
Virginia Beach, VA 23453-8083(757) 368-4160
Fax (757) 368-4109
www.lions.odu.edu/org/ilr/
oduilr@juno.com

Jefferson Institute for Lifelong Learning (JILL)
University of Virginia
104 Midmont Lane
P. O. Box 400764
Charlottesville, VA 22904
(434) 982-5272
www.jilluva.org
jinst-learn@virginia.edu

Osher Lifelong Learning Institute (OLLI-GMU)
George Mason University
4210 Roberts Road
Fairfax, VA 22032
(703) 503-3384
Fax (703) 503-2832
www.gmu.edu/departments/lri
lri@gmu.edu

Life Long Learning Society (NCU-LLS)
Christopher Newport University
One University Place
Newport News, VA 23606-2949
(757) 594-7568
Fax (757) 594-8736
Users.cnu.edu/~lls
jbslzbe@cnu.edu
www.cnu.edu/lls

Lifelong Learning Institute (JMU-LLI)
James Madison University MSC 4011
Harrisonburg, VA 22807
(540) 568-6409
www.jmu.edu/socwork/lli
grembino@jmu.edu

Lifelong Learning Institute (LLI-NVCC) (first classes October 2003)
Northern Virginia Community College, Manassas Campus
6901 Sudley Road
Manassas, VA 20109
(703) 257-6634
Fax (703) 361-5269
www.nvcc.edu/manassas/continuing
joycekister@braemarnet.com

Lifelong Learning Institute in Chesterfield County (LLI-CF) (first classes March 2004)
Virginia Commonwealth University, Virginia Center on Aging
Brandermill Woods Retirement Community
14311 Brandermill Woods Trail
Midlothian, VA 23112
(804) 744-1173
Fax (804) 744-4894
www.brandermillwoods.com
dleidheiser@brandermillwoods.com

Lifetime Learning Institute of Northern Virginia (LLI/NOVA)
Northern Virginia Community College
8333 Little River Turnpike
Annandale, VA 22003
(703) 503-0600
Fax (703) 503-5350
communities.msn.com/lilinova
marthaklee@earthlink.net
www.nvcc.edu/annandale

Shenandoah University College for Lifelong Learning (SU-CLL)
Shenandoah University
Office of Continuing Education
1460 University Drive
Winchester, VA 22601
(540) 665-4643
Fax (540) 665-3496
www.su.edu/cont-ed/programs
dmelby@su.edu

Osher Lifelong Learning Institute (OLLI-UR) (first classes March 2004)
University of Richmond
School of Continuing Studies
Richmond, VA 23173
(804) 289-8133
jdowrick@richmond.edu

APPENDIX C

HISTORY OF ELDERHOSTEL INSTITUTES NETWORK (EIN)

The first known Institute for Learning in Retirement (ILR) in the United States was called the Institute for Retired Professionals, created in 1962 in New York City under the sponsorship of the New School for Social Research. During the subsequent 25 years, news of the concept spread, primarily by word of mouth and with little media attention. It was imitated or adapted at other institutions of higher learning, until about fifty such programs existed by 1988. In that year, thirty ILRs collaborated with Elderhostel, Inc., to form a voluntary association known as the Elderhostel Institute Network (EIN). The goals of EIN were to help establish new institutes, provide resources and services to established institutes and develop an all-inclusive organization of institutes for learning in retirement.

Between 1988 and 1999 more than 200 new ILRs were started in North America under the aegis of EIN. Each independent institute who became an affiliate of EIN, paid annual dues to help support the services of the national office. Dues to EIN by the ILRs did not cover expenses, however, and the majority of EIN's financial support was supplied by Elderhostel, Inc.

Although each institute was unique and slightly different from each other, there were three things each had in common. The first was that each institute was sponsored by a host college/university to ensure academic integrity and so members would have access to the many benefits of being located on a campus of higher learning. The second

commonality was encouraging older learners to take "ownership" of their institute by becoming members and paying dues to support it. The last similarity was encouraging volunteer participation by members in their institute, which helps develop a real sense of community among older learners.

In 2002, it was decided that the time had come for some changes. The learning in retirement movement was now a mature entity, having been part of the national educational scene since 1962. Established institutes did not need the same level of services from EIN as in the past, and many did not want to continue paying dues. Although EIN was still helping start new ILRs, even that work had become more streamlined as there were many examples from which to draw.

Going back to the original intent of EIN to develop an all-inclusive organization of ILRs, it was apparent that was not happening as ILRs continued to drop out of EIN. So Elderhostel, Inc., in conjunction with EIN staff and ILR representatives, made the decision to drop the dues all together. Services were streamlined even more and EIN has now become a "virtual" organization with services provided via the Elderhostel website. This has enabled the EIN staff to take on other Elderhostel duties along with their EIN responsibilities.

As a result, membership in EIN has risen dramatically over these last three months. From a low of about 215 ILRs, there are now just over 300 ILRs who belong to EIN. It is hoped that as time goes on, even more will join. EIN estimates that there are about 500 such institutes across North America.

Along with dropping dues, it was recently decided by the committee that represents all the ILRs, to invite programs for older adults that demonstrate high academic standards, but do not necessarily have a college/university connection, to join EIN, too. There are between 300-500 of these programs as well, bringing the North American total for learning programs for older adults to around 1,000. It is quite clear that the future of the learning in retirement movement is very secure and will continue to grow, well into the 21st century.

To learn more about institutes for learning in retirement, now called Lifelong Learning Institutes (LLIs), and the Elderhostel Institute Network, please visit www.elderhostel.org Click on the “About Us” button and scroll down to the Elderhostel Institute Network link, or go directly to <http://www.elderhostel.org/ein/intro.asp>

APPENDIX D

ELDERHOSTEL'S ROLE IN THE LLI MOVEMENT

Extracted from: www.elderhostel.org/Ein/history.asp

“The story begins with developments that occurred in parallel universes. In 1962, at the New School for Social Research in New York City, the administration approved the formation of a self-governing group of retired public school teachers who wished to design and manage their own schedule of course offerings, providing faculty from within the membership. The new Institute for Retired Professionals (IRP) was immediately popular and grew to 200 members with a lengthy waiting list by the end of its first year. Despite its success, several years passed before similar groups sprang up elsewhere in the country.

In 1976, the IRP's founder, Hy Hirsch, hosted an informational meeting, inviting institutions interested in learning more about the IRP. That conference prompted further expansion of these “Institutes for Learning in Retirement (ILRs) into half a dozen new host institutions, including Brooklyn College, Harvard and Duke. It was clear, however, that the gradual spread of the movement was not a cookie-cutter operation.

By 1985, about 50 programs had been established at colleges and universities, primarily on the east and west coasts. Henry Lipman, then director of the New School's IRP, and Sara Craven of Duke ILR, shared with leaders of other programs their desire to help people start their own learning-in-retirement groups. Dr. Kenneth E. Young,

director of the American University Institute for Learning in Retirement, proposed the concept of the Institute Network. He suggested a central coordinating agency that would publish a directory of the existing Institutes and a newsletter, and provide start-up assistance for new groups through workshops and written materials.

Meanwhile, in 1975, Elderhostel had been developing rapidly from its humble beginnings in New Hampshire. Older adults from near and far were invited to occupy the otherwise empty dorms at several college campuses and join in week-long programs taught by star faculty members featuring three mini-courses on a variety of subjects. Within its first five years, Elderhostel expanded into all 50 states. By 1985, its program sites numbered 950, all published in a hefty catalog to a mailing list of 500,000 mature learners.

While Lipman, Craven and Young conferred, Elderhostel's first and longtime president Bill Berkeley (who retired in 1997) was just becoming acquainted with the Institute concept. Berkeley liked the idea that constituents could enjoy longer-term learning opportunities in their own communities without the need for travel or overnight lodgings. Young felt that Elderhostel would be an appropriate organization to take on a leadership role in this effort and guided Berkeley's exploratory research.

Berkeley and his adult learner staff took turns visiting many Institute programs, striving to identify the common attributes which seemed most essential. Young urged them to present alternative models from which ILR instigators could choose the features best suited to their situation.

In getting to know different ILR programs, Elderhostel staff noted in an internal memorandum that “There is a fierce loyalty to the local program and a deserved sense of pride in what has been created by the membership. ...How to work together to mutual benefit is the question.”

Gradually, Berkeley became convinced that no other national organization was as well equipped as Elderhostel to lead the expansion of the ILR movement which he felt strongly would be of benefit to thousands of people. “Elderhostel is the logical major player,” he wrote, “and we ought to offer our resources to this new and exciting educational movement for older adults.” After a few unsuccessful attempts to attract foundation funding, Berkeley appealed to the Elderhostel Board to provide direct funding for the new project. Some critical assumptions were made about costs, revenue sources, and future growth. The plan called for the new venture to be breaking even within five years. Given the strong growth trends projected for Elderhostel, Berkeley felt comfortable in recommending the bold new initiative.

In June 1988, Elderhostel announced the creation of the Elderhostel Institute Network (EIN) “to assist colleges, universities and older adults throughout the country to learn about and develop campus-based Institute programs.”

A written plan for the Network cited Elderhostel's unique capacity to aid the growth of the Institute movement. The vision was that Elderhostel would “provide an appropriate, experienced administrative base, sensitive to the need to encourage programmatic independence and distinctiveness, yet aggressive in pursuit of the

opportunity to facilitate the rapid and substantial expansion of this exciting educational concept.”

Berkeley appointed Jim Verschueren to be director of the Network, to be housed at the University of New Hampshire, near his home. Having been involved with Elderhostel for 13 years already, Verschueren brought to the new venture a thorough familiarity with Elderhostel's policies, structure and people. His first year was devoted to learning more about the existing Institutes and creating materials and workshops to help start new ones. He soon realized how essential it would be to have the participation of experienced ILRs as models and mentors for new groups. It seemed important to provide services useful to the mature groups as well as the new, specifically a newsletter and opportunities to meet and exchange ideas.

An Advisory Committee was established, made up of experienced ILR leaders and Elderhostel administrators. They settled on using the term “Institute for Learning in Retirement” or “ILR” as a generic term for the constituent groups, since several of the existing groups were using that name. Verschueren drafted a working definition of an ILR, and Henry Lipman made sure that social interaction was listed as an essential element. The other advisors agreed that the social component was indeed a major characteristic of the ILRs...one which remedied the isolation of retirement and encouraged members to have “a stake in their program.”

Some programs which applied for Network affiliation did not match the working definition on all its points. The advisory committee believed, however, that “a very

broad definition of institutes should be adopted...every effort should be made to be as inclusive as possible...peer learning is not possible at every institute, but...membership control over what is taught is possible everywhere.” (Francis Meyers, a committee member from PLATO at UCLA, suggested the word “input” rather than “control,” framing a debate which continues to this day.)

A series of “development workshops” was launched as the primary vehicle for encouraging expansion of the Institute concept. The goal was to include sufficient “how-to” information so participants could begin organizing new ILRs immediately. To advertise the workshops, Elderhostel used its considerable mailing list of older adults and Elderhostel program coordinators at its sponsoring colleges and universities.

The basic workshop formula evolved, and Verschueren recruited and trained a cadre of two dozen volunteers to serve as presenters and, subsequently, as consultants to fledgling ILRs. The core of each workshop was a set of presentations of two or three different ILRs as “models,” describing their academic programs and the structural underpinnings and procedures of their organizations. An effort was always made to feature ILRs which contrasted with each other in terms of size, fees, type of community, or course leadership (i.e., whether peer leaders or professional faculty were used.) The message was always clear – get local participants involved in designing their own organizations.

In Canada, Dr. Randy B. Swedburg of Concordia University (Montreal), supported by the Lifelong Learners Independence Program of the Canadian government,

documented the varied features of existing educational programs for adult learners. He was enthused about further expansion of ILRs, and since 1991, Elderhostel Canada (now called "Routes to Learning") has collaborated with the EIN office and given assistance to Canadian ILRs in their formative stages.

The Advisory Committee urged that training materials include realistic sample budgets, to ensure that, once established, Institutes would have a reasonable chance of sustaining themselves. They were concerned that organizers would be tempted to keep fees artificially low, to entice new members, and then face difficulties if higher fees were needed later on.

Even at this very early stage of the Network's formation, the issue arose as to whether the Network should give assistance to organizers of new LLIs in a location where there may be competition with an established Institute. Nancy Sack of Harvard ILR was one advisor who encouraged a posture of aiding the development of new Institutes wherever they might be. The committee agreed, and the policy was adopted.

Convinced early on that the affiliate dues alone could never sustain the home office, Elderhostel's leadership approved the establishment of the Johnny Appleseed Fund, playing on the Network's underlying theme of "seeding and nurturing" new Institutes. In preparation for the first direct-mail fund drive, the EIN logo was created, depicting a hand planting a seedling which matures into a fruit-bearing apple tree.

By 1993, the Network had grown to include 100 Institutes, most of them newly founded with Network assistance. An associate director (this author) was brought on, with a charge to develop further the menu of services to affiliate groups, in particular the newsletters, regional conferences, and experimental study travel programs. A Network staff of four was now working with volunteers from many parts of the country to provide useful consulting services to ILRs in their formative years.

In 1994, a 16-minute video was produced as a promotional tool. Entitled "Institutes for Learning in Retirement," it featured cameo appearances by many ILR members explaining the core attributes of ILRs, especially the benefits that participation brings to them and their host institutions. A sequel video, on the mission and activities of EIN, was distributed free to all affiliates, urging its use as an orientation tool for new members and leaders.

The staff was often asked, "Why not use the Elderhostel catalog to talk up the ILR concept"? The answer was the same then as now: the anticipation that it would generate more interest than could be handled adequately. Indeed, this rationality was supported by reader response to a 1996 article in *The Elderhostel Insider*, a newsletter for "frequent hostellers." With circulation of a mere 75,000 (less than one-tenth the circulation of the Elderhostel catalog), the article drew more than 1,000 queries to the Network office.

Rather than stir more demand by promoting the idea to prospective ILR participants, it seemed wiser to prepare to meet the demand by directly persuading more institutions to sponsor ILRs. Both Verschueren and Associate Director, Mary Linnehan

spoke regularly to audiences of college and university administrators, at the conferences of the American Society on Aging, the Association for Continuing Higher Education, the Association for Gerontology in Higher Education and the American Association of Community Colleges. The word was spread also by ILR members and staff of ILR-sponsoring institutions, presenting and networking at various professional gatherings.

In 1995, Jim Verschueren moved on to a new role at Elderhostel headquarters in Boston, and Mary Linnehan was promoted to the position of director. Staff continued experimenting to find the right mix of services to affiliate ILRs. Study travel programs were offered and well received. EIN also sponsored dozens of regional conferences during its first decade, all with exuberant attendees numbering from 20 to 230. But it was a continuing challenge to offer these programs at an acceptable price and still cover administrative costs.

By 1997, the number of affiliates exceeded 200, and the emphasis of EIN was shifting. With word-of-mouth publicity abounding, EIN's materials and mentors continued to help new ILRs spring up at a rate of 25 per year. Efforts now focused increasingly on an expanding menu of services for existing ILRs, which now included conferences, study travel programs, periodical newsletters, an annual survey and directory. On the Advisory Committee's recommendation, conference programs gave more attention to the needs of mature ILR organizations, featuring topics such as membership growth, space limitations, and differences between younger and elder

members. A new email discussion group called EIN Forum also helped to meet those needs.

In July 1997, the EIN office was moved from Durham to join Elderhostel headquarters at 75 Federal Street in Boston. A new Elderhostel president, Steve Richards, came on board that fall as Bill Berkeley retired.

In the spring of 1998, the staff obtained Richards' support, and Elderhostel Board approval, for a study called EIN Future Search. The study aimed to assess both the costs and the value to ILRs of services provided by EIN, and to re-envision the best future relationship between Elderhostel and the ILRs. The very successful EIN*10 Conference, held in Washington D.C. in June of 1999, provided a rare opportunity for fruitful discussion and planning for the next Millennium. The members and leaders of the ILR movement are now sufficient in both numbers and conviction to build a self-reliant future, one that follows the ILR principles of member leadership and responsibility. To that end, EIN has become a dues-free, "virtual" organization, providing services from a special section of the Elderhostel web site. The ILR movement continues to have a viable advocate organization for the growth and a national/international voice."

Extracted from: www.elderhostel.org/Ein/history.asp

APPENDIX E

ROAD SCHOLAR®

LEARNING - IT'S A TRIP®



ROAD SCHOLAR NEWS ONLINE:

Introducing Road Scholar — Learning & Travel For Adults of All Ages!
Volume 1 Issue #1 March 16, 2004

Contents of your Road Scholar News Online:

1. Introducing Road Scholar: An Exciting New Learning & Travel Program for Adults of All Ages
2. New Road Scholar Website & Catalog are Live and Online
3. Some Special Road Scholar Program Highlights
4. Why You Have Received This Road Scholar News Online
5. Please Share this Road Scholar News with a Friend

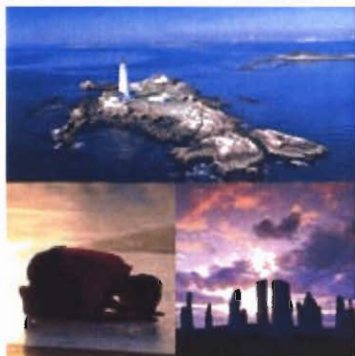
1. Introducing Road Scholar: An Exciting New Learning & Travel Program for Adults of All Ages

Welcome to Road Scholar, an exciting way to travel and learn, and a heady mixture of guided and independent exploration. Presentations by experts combine with hands-on experience and privileged access to some of the world's greatest collections, architectural gems, cultural resources and natural wonders for an experience that goes far beyond that of a typical tour or trip.

You can visit a restricted cave village in [China](#) and get an up-close look at an ancient way of life. Or, go backstage on [Broadway](#) to get firsthand perspectives from actors, directors, musicians and other theater professionals. You also can explore the wildlife and unique ecosystems of the [Scottish highlands](#) under the tutelage of a Scottish baronet who is an expert in area ecology, and a respected author. Or, [bicycle along the Elbe River](#) while absorbing European history, culture and cuisine. You can even go where "no tour bus has gone before" in the [Alaskan wilderness](#). The possibilities are endless for discovery and learning.

And while you're traveling and soaking up new knowledge, you'll be in the company of a small group (maximum of 23) of avid travelers who, like you, love to learn as they go. You'll have the structure of a daily itinerary, yet the flexibility of optional field trips and activities, or free time to explore on your own if you wish.

In short, Road Scholar offers:



- An educational program that features hands-on learning and total immersion in your chosen study topic with the guidance of outstanding Study Leaders - including academic scholars, professionals and specialists, and native experts
- the convenience of pre-arranged travel, 3- and 4-star accommodations and most meals, with opportunities to explore the area and local cuisine on your own
- access behind the scenes to fascinating places, people and resources seldom — if ever — seen by tourists
- small groups of like-minded travelers who share your thirst for knowledge and adventure.

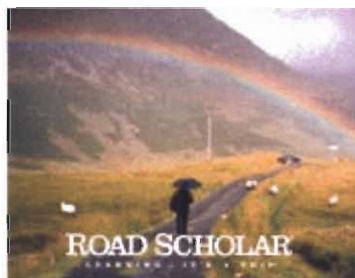
If you prefer to explore the world and its cultural treasures without bumping elbows with crowds of tourists, and come home with more than just picture postcards and gift shop souvenirs, then Road Scholar is for you. It's a new concept in travel and learning created by Elderhostel, one of America's most respected not-for-profit organization for educational travel. Your journey of discovery begins with Road Scholar!

2. New Road Scholar Website & Catalog are Live and Online!

Road Scholar has a website full of information, including our first catalog of unique and fascinating programs. [Click here](#) to go to the home page of the Road Scholar website for basic information. To see a full version of the new Road Scholar program listings, [click here](#).

3. Some Special Road Scholar Program Highlights

Here is a sampling of exciting new programs that we hope will pique your interest in trying Road Scholar:



• Antique Dealers & Auctions: Bath & London

Is it authentic? What is it worth? Journey to the antique-rich communities of Bath and London, England to get the facts from specialists! [Click here to read more.](#)

• A Spiritual Journey Through India

You don't have to be a follower of Hinduism, Buddhism or Islam to be forever changed — for the better — by the spiritual wealth of Indian culture. Meet religious scholars and holy men, who will guide you through ancient temples, philosophy and history. [Click here to read more.](#)

• Greater Yellowstone: An Ecological Excursion

You'll experience the park firsthand, with ample opportunity to hike into the backcountry and marvel at stunning beauty and diverse wildlife. Explore lush forests and the dramatic chasms of the Grand Canyon of Yellowstone. [Click here to read more.](#)

4. Why You Have Received Road Scholar News Online

We have sent you the first issue of the Road Scholar News Online because you have recently expressed an interest

in Elderhostel. Road Scholar is a new concept in lifelong learning that shares Elderhostel's educational focus, but is designed for individuals who want a learning-travel experience with small groups and more opportunities to explore on their own.

We hope you have enjoyed reading this newsletter, to ensure that you continue to receive the Road Scholar News, please add "email@roadscholar.org" to your email address book. If you don't wish to receive future issues, please see the removal instructions at the bottom of this email.

5. Please Share this Road Scholar News with a Friend

If you know someone whom you believe would be interested in Road Scholar, please forward this Road Scholar News to him or her. Road Scholar is a new program and we deeply appreciate your help in spreading the word about it. Thank you!

Extracted from: www.elderhostel.org/Ein/history.asp

APPENDIX F

INTERVIEW WITH FOUNDING MEMBERS: Wayne and Ruth Kernodle

Transcript: 11 Oct 04

Background: Wayne and Ruth Kernodle, now into their 80's, are among the visionary founders of both the Christopher Newport University Lifelong Learning Society (CNU-LLS) in 1988 and the Christopher Wren Association (CWA) at the College of William and Mary in 1990. Both are retired sociology professors. Professor Ruth Kernodle is the retired chairman of the Sociology department and founding director of Gerontology at Christopher Newport University (CNU), co-founder of the annual forum on aging held at Christopher Newport, former chairman of the Williamsburg Social Services Board and former chairman of the Colonial Mental Health/Mental Retardation Services Board and many other honoraria. Dr. Wayne Kernodle began teaching sociology at the College of William and Mary in 1945, was head of the Department of Sociology for 20 years, added anthropology to the Department, and was coordinator of William and Mary's first Elderhostel programs. He taught into his 80's and remains professor emeritus of sociology, College of William and Mary, and is currently chairman of the faculty advisory committee of the Burgenicht Program on Aging and Exercise Science. Both continue to hold various positions in the Christopher Wren Association, take, and teach classes, travel and participate vigorously in a variety of interests. "Although Wayne and Ruth Kernodle give credit to many for the success of the program, there is little doubt among those who have been with the program from the start that it is the dynamic energy

of these two dedicated educators that has enlivened CWA.” (W&M Alumni Gazette, May 1991)

Interviewer: How is it that you weren’t satisfied with what was offered in existing college programs? What caused you to want to do something different?

Kernodle: Well, the state offered the undergraduate tuition free program but that committed you to the whole semester and only if an empty seat was available. Most seniors don’t want to commit for a sixteen week semester – they want to be free to travel intermittently and prefer courses of short duration that fit between their travel periods. Often seniors won’t commit for more than three weeks, never mind 12 or 16 weeks. They don’t want to pay for a lot of classes they will cut; and, they want short samples of diverse subjects. (Interviewer’s note: In 2003, VA eliminated the maximum income restriction of \$15,000. for eligibility to participate in the tuition free and space available undergraduate credit classes. Abolishing this restriction has had no appreciable effect upon the poor participation by seniors eligible for this benefit – a mere fraction less than 1% of all seats in Virginia’s colleges are occupied by senior citizens. Less than 50 seats are occupied by tuition-free students at any college or university in any year. Some schools report only in terms of ‘traditional’ students age 17-25 and ‘non-traditional’ students above age 25 and the data are little or no more discreet.) Seniors who already possess degrees are not especially interested in many of the “how to” courses offered through the “continuing education” venue (for example: cooking, gardening, etc.). Many well-educated lifelong learners desire the kinds of philosophy and liberal arts courses they perhaps had not previously had the time or opportunity to explore. Some seniors

remain apprehensive about participating in classes with traditional students. Seniors were concerned about writing papers, taking exams, and keeping up with the youngsters.

Seniors wanted to study liberal arts on their own terms. Many seniors were already well-educated, holding degrees with post-graduate studies and professional licenses.

Interviewer: Had you ever been exposed to a program like what you wanted to start here – had you seen or participated in a program elsewhere that you might model?

Kernodle: No. Of course we learned from the startup program at Christopher Newport University and we used many of those lessons to begin the program at the Christopher Wren Association at the College of William and Mary. We have very fertile ground in the Williamsburg area with a wealth of assets to grow this program – more than any other area of the state. We had a very successful experience with Elderhostel and it revealed the wealth of resources converging here – many retired faculty, retirement communities, etc. The Elderhostel offerings were often promptly ‘sold-out’ and this indicated the senior population was hungry and eager for such programs and would and could support them. The state coordinator for the Elderhostel super-site at VCU had talked to Dr. Wayne Kernodle about starting the site at William and Mary.

Interviewer: (On reviewing the data presented.) Please notice that all thirteen of the Lifelong Learning Institutes in Virginia were started since the late 1980’s – if fact, three of them started during the past year. This is a red hot area and getting hotter every year.

Interviewer: We were fortunate to present our prospectus at a fortuitous moment in time when we were blessed with a receptive environment at the College of William and Mary. Wayne still has many friends in the administration and faculty, especially the Vice

President for University Advancement, Ed Allenby, who had previously worked at the University of Delaware. The University of Delaware has a very successful Lifelong Learning Institute with several thousand members. (Delaware even built their own building and rents it for other uses, for example: weddings, receptions, conferences, etc. scheduled around the class time periods for additional revenue.) Ed Allenby was immediately interested in helping us and he did. Ed Allenby set the stage for services to support the CWA at William & Mary including free classroom and office space, copying, phones, computers, etc., things that a lot of other startups didn't have. He (Allenby) saw this as a means for the connection and interaction between the college and the community. He (Allenby) was already alert to, and recognized, that the college charter includes an obligation to do things for the community service. The President of the college, the Provost and other principals of the college were looking for that kind of connection, too. We started just about the same time that the college discontinued the continuing education courses which had become too much of the "how-to" types of things.

Interviewer: What do you mean by "how-to" types of things?

Kernodle: The kinds of "how to" skill courses that are not especially academic, similar to the community "Learning Tree" events advertised in the Williamsburg Gazette, certainly not the liberal arts sort of collegiate academic courses that we wanted...and the college felt that they were not a good use of their time and money.

Interviewer: I spoke with Gail Francis, the activities coordinator here at Williamsburg Landing, to get an idea of the learning activities offered here in your retirement

community. She told me that you have roughly 500 residents here in the community, about 100 of those are confined to the nursing home, and of the remaining 400, and about 100 were already members of the Christopher Wren Association at the College of William and Mary. Your community routinely fills the 29 passenger bus to commute residents to classes on campus and attend the weekly 'Brown Bag' lecture luncheons. Also, Williamsburg Landing retirement community is hosting five CWA classes here onsite this semester.

Kernodle: Yes, we have also had classes at Chambrel (another retirement community in Williamsburg) but their activity room is not really conducive to the type of classes we prefer – it is a more public room with a lot of through traffic that makes it hard to concentrate. And, from time to time, we had used a variety of local churches, for class space...but we like to keep it on campus as much as we can. We use the Wightman Cup room of William and Mary Hall and the Little Theater in the Campus Center as our dedicated spaces. We prefer to limit it to 100 per large class but we can get up to about 300 into that space when needed. (Interviewer comment: I have taken a few classes there myself and was astonished to find 300 or more people there filling every chair and standing room only with standbys ready to fill empty seats, etc.) Yes, we have waiting lists for many classes and the problem is that we have now come to have so many members that we have to ask for first and second choices at registration. Thus, if they don't get their first choice, we can offer them something else. However, some people, if they don't get into their first choice, they opt out of registration and their fees are returned.

Interviewer: CWA has a brilliant attitude about continuing to grow to meet the demand...it keeps growing the curriculum and the facilities to meet the needs of the membership.

Kernodle: Yes, and members can take more classes than they originally register for by adding classes that are not filled to subscription – as many more classes as they wish above the 12 hours included in their \$75 per semester registration fee.

Interviewer: CWA has more than 1,100 senior students registered for this semester. This is awesome for a small town like Williamsburg. If you look at the demographic population density maps I have provided, you will see that Williamsburg has a very high density senior population despite being a small town. Our senior market population could grow several times over the next few decades. Even though we certainly have the population volume to continue to support our program, I'm afraid that the administrative burden on our volunteer organization is huge.

Kernodle: For a town the size of Williamsburg, it really is amazing. You know, we've had the same two part time employees since we started. We started out with two part time people and we still have two part time people. Of course, we've changed the structure of the organization and we've computerized many operations. (Interviewer's note: There are still many sizable Lifelong Learning Institutes that are not computerized. They are still doing registration and mass mailings, etc. by hand.) This has made it possible for the two part time people to handle the growth from 125 members the first year to over 1100 members this year. Volunteers are vital to the ongoing operation of CWA.

Interviewer: I think for this region we are second in size to Duke University's program that originated in the mid 1970's and now has about 1200 members...even though they've been around about twice as long as CWA, they have about the same capacity. But, they also have a quite different structure than we do, they are imbedded in the university organization, they have dedicated university employees, their own buildings on campus, even their own parking on campus! They limit their size and maintain extensive waiting lists for admission.

Kernodle: You know, from the very beginning, we've had excellent cooperation from the College of William and Mary...all the way down from the President of the College.

Interviewer: How did you manage to make all this work with the College when you don't even have a written agreement with them?

Kernodle: Well, you know that I've been on the faculty forever. (OK. So, it was an inside job!) Well, it started with Ed Allenby being so enthusiastic about it. He helped to recruit support from the rest of the administration. He was also aware that the legislature routinely looks at how the college uses its space and how many people use that space. The CWA students' use of space counted into calculations for the college facility use. We have a college community relations committee that looks at how the college can support the community and, of course, CWA makes direct contributions to the college. Contributions are made directly from the CWA budget to the College of William and Mary library, for students in international studies to study overseas, for research between faculty and students, to subsidize student trips, to support the Muscarelle Museum of Art, etc. We receive proposals every year for sponsorship. We give a lot of money back to

the college every year to show our appreciation for the great support we have received from the college. Another way we show our CWA cooperation and support to the College of William and Mary is in our attendance at college lectures and activities. You can go to any event at the college and you will see that half the audience is comprised of gray-haired CWA members. The college appreciates that and the CWA members feel like a part of the college. Many professors often say they so enjoy teaching to a CWA audience because they want to be there, ask intelligent questions, engage in vigorous debate, etc.

Interviewer: Where do you think the whole movement is headed at this point? How will we accommodate the growth expected from the influx of the Baby Boomers and their echo? How will we cope with growing our LLI?

Kernodle: Well, that's a real puzzle. We are fortunate to have a rich population of retired faculty that are active and involved and the many experienced people who come to Williamsburg to retire, yet are able and willing to teach as volunteers. I don't know how that environment can be reproduced everywhere.

Interviewer: There are several studies that suggest that the community college system should pick it up as a matter of public policy and make lifelong learning courses equitably available to all elder learners through their already well-distributed network of facilities. If you would please refer to the state maps with the market area rings identifying the 10 and 20 miles radius around each target audience. We are very lucky to be so close to our college. I'd like to return to our introductory remarks, when you told me that you were involved in the Christopher Newport University (CNU) Lifelong

Learning Institute startup in 1988. Why did you feel it was necessary to start another institute, the Christopher Wren Association at the College of William and Mary, when it was only about 15 miles to CNU?

Kernodle: Oh, we don't want to travel so far. We might go down to Newport News to shop once in a while but we don't want to have to routinely commute that far for classes. I know that school budgets are a problem for the Commonwealth of Virginia right now, but, if we go in the community college direction, it may be that we would want the legislature to look at supporting them.

Interviewer: Two of the newer Lifelong Learning Institutes (LLIs) in Northern Virginia were planted in the community college system. They are both building up very quickly. There will actually be a decline in the growth of the traditional age 17-25 student population which will begin about 2010 and adopting the LLIs may well be the way for community colleges to fill those seats as they become available just at the same time as the aging boomers are flooding into the market. This just seems like a natural fit to me. I'm afraid that the current growth stresses the volunteer organizations and I don't think the volunteers can support the exponential increases. I think that is why so many of the LLIs have capped their enrollment.

Kernodle: It's true that some of them are having problems getting volunteers to do the work. Some volunteers don't want to work that hard in retirement. We have never had that problem in Williamsburg. We have a fabulous community and many willing volunteers to share the workload.

Interviewer: I think it will be a little trickier in Martinsville and other more remote communities. Perhaps they will need some state support, especially during startup. They will need some faculty to shepherd it and keep it alive during the startup and recruitment period.

Kernodle: I would imagine that the nature of the remote markets will be somewhat different in the rural areas. I think more than 99% of our members in CWA are college graduates. You wouldn't have that in Martinsville, an industrial town. Maybe it will have to be pitched a little bit differently. Yet, there is something about a volunteer organization (where no one is paid except the two part time office people) that keeps people involved. It allows people to drop in and drop out at will. People feel like the CWA is 'theirs' – there is an ownership. We take turns rotating through the various volunteer positions. We even questioned at one point whether we should continue as a volunteer organization. We observed that at Duke, for instance, where they had some paid positions that the members didn't feel like they had to be so involved because they had paid staff to care of it. If they needed three more classes, they let the paid staff find three more classes. If it were us, we felt a greater commitment to be involved in our own success. Our members are very active in our organization.

Interviewer: CWA graciously participated in the Mid-Atlantic conference last fall that was sponsored by CNU at Virginia Beach for about 150 representatives for LLIs from all over the country. There was only one other conference in 1999 which was called a national conference with somewhat limited attendance. Then, in 2002, Elderhostel International Network (EIN) abandoned its efforts to continue to collect dues for a

national organization of institutes and turned it into a 'virtual' organization rather loosely managed by internet postings, no dues, no reporting requirements, no enforcement of standards, etc.

Kernodle: At about the time that we were starting up, there was some national activity that we thought we might learn something from but we were pretty independent about our own development.

Interviewer: We seem to be pretty well developed and represented to the north and east but there are other areas that are not well-developed with LLIs. As a matter of fact, at the Mid-Atlantic conference, we had several delegates who were state employees from Arizona where they had unsuccessfully attempted to plant LLIs in the state college system. These state employees were from the Arizona state library system where they would try to field new LLIs. Another unusual example of alternative startups is the LLI in Chesterfield County at the Brandermill Woods retirement community. It is co-sponsored by Virginia Commonwealth University, the Brandermill Woods retirement community, John Tyler Community College and others. The Chesterfield County school board donated an unused elementary school and monies to renovate it for day use by the LLI and night use by the county's adult and continuing education programs. A variety of volunteer organizations made donations of money and time/effort to the renovation. I worry about the organizations that are held together by the strength of a few personalities without binding agreements. What happens when those relationships are lost? Will they survive?

Kernodle: Oh, yes, I think so because there are so many retired faculty that have become members of CWA and remain ex-officio members of the College of William and Mary and will continue to look out for our interests. You know the college counts our students into their facility use calculations and these numbers improve their percent of use of the buildings and help to justify facilities. I think the college sees the value of the CWA. I don't see any problem with that.

Interviewer: All the LLIs are rather young – having been organized in the last fifteen years. Many of the founding members are still involved with their LLIs. When they move on will the LLIs be able to continue without them and the relationships they had with their colleges?

Kernodle: Well, Ed Allenby gave us some good advice at the beginning, he told us to get it started but don't hang on to it. We handed over the reigns to a succession of appointed officers and no longer had anything to do with the decisions that were made. We left it in good hands. We keep a string on it and if it goes down three times we pull it back up. They are all very competent people.

Interviewer: Some of the LLIs are imbedded in the formal structure of their host schools and are more formally organized – they appear in the hierarchical line and block diagrams of the faculty and staff. Others are more loosely associated with various departments, deans, and schools.

Kernodle: We like being under the Development office. That's another thing Ed Allenby advised us about. He thought it would be better under the Development Office than being under the Education School or Continuing Education because the

Development Office had a better perspective about supporting community activity. They often deal with this kind of thing in community relations.

Interviewer: I think he did you a huge favor. The Development Office would be a persistent element of the organization whereas some of the LLIs ended up being organized under departments of continuing education or adult education that trended up in the 1970's and then were phased out in the 1990's. Therefore, their relationships with their host organization were frustrated.

Kernodle: Yes, those under continuing education had very serious problems because they were extinguished. Besides, Development has funds, they have resources. They have been very gracious with us. They are also interested in us because we are among their future contributors since there are a lot of CWA people that have some money. This is a very affluent community, relatively speaking. You know when we have our Convocations and Administrative Officers of the college come to speak and we have the WRENNnaissance Picnic (wordplay on the Christopher Wren Association name), the chancellor attends and many other principals of the college and the people mingle and network.

Interviewer: I think you have given me a golden nugget here about the host relationship. Being organized under the Development Office seems to be a key feature of the continuing lifeblood of the LLI and the enduring relationship of the LLIs with their sponsors. If they align themselves with continuing education or adult education and that department goes away, they are disenfranchised.

Kernodle: That's probably what will happen at the community college level.

Interviewer: Well, at the community college level, they are conferring associate degrees or technical certifications. They train for teaching assistants or such. I'm not sure exactly where they should fit in the community college system. As a matter of fact, I attempted to call the two in northern Virginia last week and was run around several departments because it was not well known where the LLIs were connected to the community college structure. Their adult education classes are not necessarily the philosophical liberal arts classes we discussed earlier as our preferences. They tend to be a little less intellectually challenging or meeting the physiological/gerontological and rehabilitative needs of seniors. Part of the allure of the LLIs at our four year colleges and universities is the appeal of sophisticated study for a well-educated intellectually curious audience.

Kernodle: That's where I think you're going to run into a problem at the community college level. Are they going to be able to offer the sort of courses we are talking about? Where are they going to get the faculty?

Interviewer: When we look at the population density of these more remote communities, they are less likely to have higher education degrees, and more likely to be interested in the less philosophical liberal arts courses that may appeal to members of a more rural community.

Kernodle: Well, for instance, in Asheville, NC at the Center for Learning in Retirement, they have everything – a full range of courses of study, painting, philosophy, liberal arts, volunteer activities, - everything.

Interviewer: It seems to me that regionally their offerings are different in response to the communities they serve. Perhaps those agricultural communities are going to desire a different assortment of classes than we demand here.

Kernodle: Well, those colleges have very significant state funds. We have thought from time to time about building our own building. I always resisted that because I wanted to stay as much on campus as was possible. Our members like to walk on campus and see the students. Over time, we have found it necessary to have some classes here at Williamsburg Landing Retirement Community and some classes meet at Chambrel and soon Windsor Meade will host some classes. Heritage will be another very large retirement community that will want service. All the big communities run their own buses to our classes.

Interviewer: Yes, the lady who represented the University of Delaware at the Mid-Atlantic conference talked about their building giving them the flexibility to change the core hours of their classes, flexible classrooms that could be sub-divided to accommodate varying sizes of classes, and the control of their own facility that allowed them to grow exponentially and receive revenue from renting the facility.

Kernodle: Well, if someone wanted to give us a building, that would be one thing, but, to go in over our heads, with a mortgage at this late date...I think it would be a stress. Well, at one time we had a guy who said he could raise the money to build a building named for Ruth and me as founders, but we did not push it.

Interviewer: Do you think that's what we need next?

Kernodle: Oh, no. We like it as it is now. So long as there is any space on campus we want to stay or even if we could build a dedicated space on campus for us.

Interviewer: Well, now that you are up to having five classes off campus here at Williamsburg Landing Retirement Community, do you think that the idea of having multiple remote locations is sufficient? It doesn't have to be a building in one place. I think it's like the church, it's not the building, and the church is the people. I think that's the life of CWA, it's the people, I don't think it's about the building. You didn't always meet in the Campus Center Little Theatre.

Kernodle: Yes, but the Wightman Cup Room has always been ours. But, I know what you are saying. There are people who won't go to classes unless they could have them here (in the retirement community). They won't travel much further. When they register they specify onsite classes. Even if we only conducted classes in our offsite locations, we would still have a fairly sizable CWA.

Interviewer: Suppose it became a virtual (electronic) community like Elderhostel International Network (EIN) has become? I imagine there would still be a home station for CWA on campus and then there would be multiple remote class sites in retirement communities like Williamsburg Landing, Chambrel, Colonial Heritage, Patriot's Colony, etc. a distributed learning environment dispersed around the area.

Kernodle: We wouldn't like it all web based – we like to meet together and socialize! Wightman Cup Room is known as the CWA room and people like to be on campus.

Interviewer: Since we're talking about this identity grouping, I think I am observing that there is also an optimum period during which people seem to seek membership for

participating in LLIs. Some writers, like the center at Asheville, call it the third age of learning. Let's say that those are the post-retirement years immediately following formal retirement, roughly the 60's and 70's, then fade from participating and remain within your retirement community without venturing down to campus. Then, you transition into your CWA remote sites located within the retirement community. I could see where CWA has evolved so that you would graduate from one kind of service to another in waves of ages.

Kernodle: That's OK, so long as the campus remains the central heart of the CWA. That is similar to what is happening in Chapel Hill around Duke.

Interviewer: You probably didn't notice it happening while it was happening, but CWA has evolved to meet your needs, too.

Kernodle: Well, at the time, we were just looking for space for classes.

Interviewer: Well, now we sort of have graduated levels of participation in CWA. For those who still drive or are able to jump the bus and go downtown, they are still attending on campus. But, there are only 29 seats on the shuttle bus. Then, the next level participates within their retirement communities.

Kernodle: Well, we just need a bigger shuttle or more of them.

Interviewer: This morning as I developed a profile of this site, I noted that you have about 100 in the nursing home, and another 100 residents of the 500 total in the Williamsburg Landing Retirement Community who are CWA members. For the luncheons, you put 29 on the bus and the others who are still able bodied jump into their

cars and go downtown. Such that you still get about 100 Williamsburg Landing residents who participate on campus throughout the year.

Kernodle: We also get people from outside our community who commute here (to Williamsburg Landing retirement community) from other retirement communities to participate in the classes conducted here. These classes are very popular and people fight to get into them. We get the shuttles from Patriot's Colony and Chambrel and others. (Interviewer's note: It would be necessary to compare the residential rolls to the class lists to determine the mix of residents in each class. The attendance data are not differentiated by CWA.) CWA centrally receives registrations and payments and makes the class assignments – they don't account for whether it is a Williamsburg Landing resident requesting a resident site class. The enrollment information doesn't capture those data.

Interviewer: We'd have to back into those data, it is not reported to national or collected at local levels. Even what data we have here before us were hard to come by – it originated from the survey prior to the Mid-Atlantic Conference hosted by CNU and then, this interviewer subsequently collected additional data by individually contacting the LLIs.

Kernodle: Otherwise, you would just assume that everyone who takes classes at Williamsburg Landing is a resident but that's not true... This is a good site and we have plenty of residents who want to take their classes here. They see this as a service to Williamsburg Landing. On the other hand, for others living in Kingsmill or Governors Land or whatever, when they come here for a class, and they see how nice that it is and

they get ready to retire to a place like this – this is a great introduction to our community. It's marketing! You'd better believe that it is! CWA is a big marketing tool - not only for retirement villages but for the whole community. Real estate agents are using CWA as a 'come on' to sell this area.

You know, the other retirement communities send their shuttle buses to our campus luncheons, too.

Interviewer: Well, is there anything else that you wanted me to know?

Kernodle: We had a steering committee of eleven people to startup CWA. Ed Allenby from development, Bob Jeffrey from continuing education, Colleen Whitacre from continuing education, and J. McCord from the faculty were members, plus members from the community.

Interviewer: Do you remember when they cut continuing education at William and Mary?

Kernodle: It was just a couple of years later – it didn't last long. It was the early 1990's. It was still operating when we started. You might be interested in talking to the liaison at the development office that interacts with the Christopher Wren Association (CWA).

Interviewer: I think the golden nugget this afternoon is that relationship emanating from the development office as opposed to an education department association with the host institution.

Kernodle: It is invaluable that they see the relationship as a part of their contribution to the community. It is consistent with 'follow the money' philosophies. CWA members

today contribute to the college in many ways and ask very little in return. We started with borrowed space and enrolled over 100 members in our first year.

Interviewer: Please tell me, when you started CWA at William and Mary, did you bring other members from CNU to seed CWA?

Kernodle: No. We recruited over 100 NEW members for CWA. There has never been any real connection between the one at CNU and CWA.

Interviewer: Surely, there were lessons learned from the CNU startup that helped you to form the CWA.

Kernodle: Yes. What I mean is that there was never any formal connection. We did invite each other to participate in trips and special events, but, there was no formal organizational relationship.

Interviewer: Are there any other aspects of the LLIs that we haven't talked about that you would like to talk about? There seems to be some concern about the affiliation agreements between the thirteen LLIs and their hosts. If the relationship with the host school is dependent upon your personal relationship, how will it survive when you leave the relationship? If no contract exists, how will they continue to benefit one another?

Kernodle: The business office keeps our financial accounts and works closely with our staff. We have separate budget accounts and they charge us for servicing it. At Christopher Newport, for example, they had to pay for each check that they wrote. And that is true for other places, too. We've had a very unusual relationship, I think. CWA and the college have been mutually beneficial. We had a lot of help in founding it and we continue to get a lot of help, it no longer depends upon us at all. Surely, the cost-

benefit relationship weighs heavily in favor of the college. They know. They've figured it out in terms of space and use requirements. Now, what happens when William and Mary becomes a charter institution – that may change things. Then, we'll be more dependent upon the local decisions.

Interviewer: Of course, we have the advantage of being able to say that we are adding over 1,100 constituents to the bottom line. Some of the smaller LLIs don't have that much leverage.

Kernodle: One of our College of William and Mary board members, Jim Ukrop, was asking me what CWA does for the college, I was glad he asked and told him about all the contributions we have made over time. He was so pleased and assured us he would tell the Board.

APPENDIX G

Learning in Retirement Residences

Residential retirement communities offer a variety of educational opportunities as a routine feature of their marketing approach. Continuing Care Retirement Communities (CCRC) are a blooming industry that is flourishing with offers of a low-maintenance lifestyle, graduated health care and a full roster of social, cultural and educational activities. The offerings may be as simple as the self-styled “how-to” lecture by a staffer or as elaborate as a contractual agreement with a local college or university to conduct classes on site or field trips to historical locations. The corporate conglomerates with multiple locations often employ a “Director of Activities” or a “Director of Lifestyles” specialist in each facility that coordinates educational programs and other activities for residents. Del Webb operates dozens of ‘lifestyle’ communities across the country, including several in the Commonwealth of Virginia. The Mid-Atlantic Presbytery has a dozen locations comfortably assisting thousands of retirees. Westminster-Canterbury has six primary sites in Virginia reported to be among the leading providers for the “unretiring mind.” Another example in Virginia, Brookdale, is the parent corporation of Chambrel in Williamsburg and the Grand Court in Bristol which are included in their chain of more than eighty retirement residences across the country. Each has hundreds of residential units and hundreds of residents receiving various levels of assisted living services. The Chambrel site in Williamsburg has hosted classes from the Christopher Wren Association of the College of William and Mary. Nearby, Williamsburg Landing in Williamsburg has 500 residents including 100 members of the Christopher Wren

Association of the College of William and Mary who enjoy five classes on their residential site this semester. Williamsburg Landing shuttle buses transport students who attend classes on campus and the weekly luncheon lecture series in the University Center's ballrooms. Ford's Colony and Colonial Heritage are in the first phases of building thousands of retirement residential units in the Williamsburg area.

The American Association of Homes and Services for the Aging (AAHSA) represents not-for-profit organizations dedicated to providing high-quality health care, housing and services to the nation's elderly. The list of agencies serving the aging that follows the references at the end of this study details the contact information and service jurisdictions for the regional area agencies of the Virginia Department of the Aging. The twenty two area agencies listed at the end of this study thoroughly serve the entire Commonwealth of Virginia. The websites of each area agency offer different degrees of sophistication and depth of connective links to other services. Additionally, "retirenet.com" lists the top 100 master planned communities in the nation and "newlifestyles.com" offers online retirement shoppers a vast array of choices and links to other resources. Socializing with the lifelong learners in any setting provides an inestimable wealth of information and testimonies to the features of their chosen communities.

APPENDIX H

Education While Working?

In October 2004, the University of Richmond's School of Continuing Studies published the results of a study of adult education policies and a survey compiled by teachers and students. Bob Freundt, an adjunct professor at the University of Richmond, and colleague, Dan Roberts examined adult education practices at 101 area employers. The questionnaire survey was distributed to the human resources administrators, "about evenly among the region's largest companies, midsize businesses, and smaller employers." **Key findings** include:

88% of companies **offer** some type of tuition **reimbursement** for employees who take classes to improve their skills or credentials
At 68% of companies that offer reimbursement, **5% or fewer** of the **employees took advantage of the benefit** in 2003. At 21% of the companies, employee participation was between 6% - 10%. And, at 11% of the companies, more than 10% participated.

The top reasons employees did not participate, according to human resources directors:

70% **time** constraints

31% financial

26% complacency

22% employee restrictions

21% no employer encouragement

18% lack of awareness about benefit

Companies reimburse at the following rates:

30% will reimburse all tuition

60% reimburse all up to an annual limit

10% do not fully reimburse

67% of companies require college classes to be job related.

76% require employees to pay tuition costs upfront and the company reimburses them later.

92% require the employees to achieve a certain grade to be eligible for reimbursement.

“The research shows little or no evidence that employers have, as of yet, made continuing adult education a strategic priority for their work force,” the professors wrote. “This has created a culture of passivity on the part of workers.” One fourth of the human resources directors mentioned employee complacency as a reason for low participation, while one in five said workers are given no incentive by employers to take part. One HR director said employees are given “no tangible reward for going through the effort” of taking classes. Another said that even though tuition reimbursement is offered, it “is not encouraged by management.” The researchers concluded that “survey responses do not reveal a significant effort on the part of employers to

encourage employees to continue their education.” That attitude is most prevalent among “smaller companies where the bulk of Richmond’s employment growth is taking place,” according to the study. “They are most likely to have no educational support system or to have the most restrictive policies.” Freundt, an adjunct professor who led the study and (was) a former HR executive in the private sector, said he understands that many companies are reluctant to spend the extra money on continuing education for employees. But, over the long run, he believes, not making that investment could be costly for employees, employers and the entire region. Once they get a job, “a lot of people decide that learning is over. They shoot themselves in the foot,” Freundt said. Not so long ago, he added, many people “could live a middle class existence with a high school education. That’s not true anymore. You’ve got to be a learner.”

In a growing but changing economy, it’s vital for people to be looking ahead, Freundt said. “You don’t want to wait until you lose your job to do something. You want to be in the classroom so your skills are cutting-edge. Then, when you’re in the job market, your skills are marketable.” Freundt believes improving education can have important economic development implications for a region such as Richmond. It is difficult to find studies to compare his findings with those of other regions, Freundt said. He is quick to say that he doesn’t think low levels of adult education is a problem only in the Richmond area. Instead, he

suspects the Richmond findings are probably quite typical of many areas around the country. Still, the local area is clearly trailing fast-growing metropolitan areas that have placed a strong emphasis on education, Freundt said. “Raleigh-Durham. Austin. Texas. Boston. Seattle. We’re not even close to them in terms of educational achievement. I think we need to promote the idea that Richmond will progress if it’s more of a learning center. There’s no downside to having a bunch of smart people around.”

The experience of the past decade suggests that if an area boasts a highly-educated workforce, industries will come to the workers, Freundt said. That is a bit of a twist on the traditional economic development model, which assumes top-notch workers follow new industries into town. Freundt believes Richmond, as home to two major universities and quite a few smaller colleges and business schools, is in a good position to boost its educational achievement. “We’ve got a darn good educational infrastructure here. What we have is an underutilization of that infrastructure.” He also envisions the creation of a “learning corridor” anchored by the two of the nation’s top state-supported schools – the University of Virginia to the west in Charlottesville and the College of William and Mary to the east in Williamsburg – with Richmond planted squarely in the middle. We would have the same infrastructure as Raleigh-Durham, just a little more spread out.”

Greg Wingfield, president of the Greater Richmond Partnership, which oversees the region's economic development efforts, said that "even though the study is Richmond-based, I think it reflects national trends." He agrees that education and work-force issues have become very important as regions compete for business. "Gone are the days when it was all low cost labor." Wingfield said Richmond's work force is competitive with similar markets. In a recent study that compared Richmond with Charlotte, NC; Jacksonville, FL; and Nashville, TN, Richmond had the most productive work force and the highest percentage of workers with degrees in science and engineering, he said. But Wingfield believes "there needs to be more of a connection between the education community and employers." The challenge, he added, is figuring out how "to get the two groups together to have smarter, more educated workers." Wingfield said that he was not entirely surprised by the findings of the UR study. "Most people are aware we need to be **lifelong learners**. The problem is how you fit it into your jam-packed day." One answer, Wingfield said, might be for employers to include more education opportunities within the workday and provide clear rewards or benefits for people who pursue their education. "That's where you could start getting results – if the company shows it's important."

(as reported by staff writer, Bob Raynor, Richmond Times-Dispatch newspaper, Metro Business, October 11, 2004)

APPENDIX I**Virginia Lifelong Learning Conference****Brandermill Woods Trail
October 23, 2004**

(Conference Cohost, Eileen Duggan, OLLI-GMU, summarized notes)

Summary of Session 1: Organizational Relationships Between LLIs and Hosts

Panelists: Michael Styles, Osher Lifelong Learning Institute, OLLI-GMU
James McGrath, Jefferson Institute of Lifelong Learning, UVA-JILL
John Sprott, Arlington Learning in Retirement Institute, ALRI-GMU

Michael Styles noted he had categorized Virginia LLIs into three general categories: Largely Independent, Mostly Integral Unit of Host, Fully Integrated Into Host (see his August 29, 2004, paper). Because of the wide differences in the nature of relationships among LLIs, any categorization cannot fully or accurately describe the relationship for specific LLIs. OLLI-GMU falls in the first category as a legally independent LLI with its own incorporated and 501(C)(3) status responsible for its own decisions, hiring of staff and all other matters. Prior to 2002, the only written understanding with GMU was a rental agreement for the use of space on GMU campus. However, in 2001 GMU advised LRI that the State was pressuring GMU to regularize the status of its many affiliates. The resulting affiliation agreement specifies what GMU does for LRI (e.g., space on campus, printing services, IDs, e-mail accounts) and what LRI does for GMU (e.g., working relationships with particular GMU departments, scholarship for GMU students, lobbying). While the agreement has worked well and there are no major current problems, we have no guarantees that GMU will meet our space and other needs on

campus as we expand. There may also be advantages in having GMU handle our accounting and/or provide staff support of State employees. It is for this reason that we are interested in the experience of other Virginia LLIs.

James McGrath noted that JILL was also a separate corporation with 501(C)(3) status with a basic affiliation agreement. However, UVA provided no space on its campus or other services, nor was JILL obligated to provide lobbying support or scholarships. JILL would like to expand the relationship.

John Sprott noted that ALRI had four affiliations:

- GMU based, in most part, on the OLLI-GMU agreement, but so far without the provision of adequate space or grants of scholarships for GMU students.
- Arlington Public School System, which provides space and a number of services for a flat fee.
- Marymount University for teacher assistance.
- Arlington Public Parks for space needs.

Following the panel presentation, a number of matters were discussed about relationships with hosts and other areas of interest. A question revealed that the only other Virginia LLI with multiple affiliations is LLI-Chesterfield County.

Summary of Session 2: Program Development, Implementation & Evaluation

Panelists: Toby Netherton, Institute of Learning in Retirement, ODU
 Martin Cohen, Lifelong Learning Society, CNU
 Kathryn Russell, Osher Lifelong Learning Institute, GMU

Old Dominion's ILR has been in existence for 11 years and has 500 members. They offer 25 courses per term in 4 sessions per year. The program features the short-class model, with one-or two-hour presentations per course preferred, and a maximum of 4 classes per session. This short model contributes, they believe, to ease in getting professors from local colleges. Instructors also include institute members, local

historians, and other community leaders. Trips and social events are also offered. Ideas for classes are generated by a curriculum committee with 4 subcommittees of 4-5 people. Each subcommittee focuses on different disciplines and develops ideas for courses each term. Course evaluation forms are handed out at the end of each course, primarily to get ideas for future courses.

CNU's Lifelong Learning Society, with a membership of about 500, also has a planning committee of 15-18 people who meet regularly to plan in advance for 3 sessions per year. Both the fall and spring terms feature 2 sessions each which meet for 5 weeks, break for a week, then reconvene for 5 more weeks. A total of 42 courses per term are taught by retired and CNU (current) professors, society members, and speakers from such local organizations as NASA and the Mariner's Museum. In addition to regular classes, trips, concerts, and Monday lectures round out the program. The most popular courses include world events, history, geography, politics, art history, athletics, gardening, and pottery. Brief evaluation forms are given out to students on the last day of class.

OLLI-GMU's program is similar to ODU's and CNU's in that OLLI's program is developed by a Program Committee of about 20 members and is headed by a coordinator (Carol Ferrara). OLLI-GMU also has a Special Events subcommittee responsible for arranging trips and special presentations. In addition, Resource groups representing 15 disciplines meet twice a year to develop course ideas, evaluate past offerings, and suggest instructors for upcoming classes. The Program Committee chooses among suggested courses and helps find instructors. In general, courses tend to be academically oriented.

Spring and fall sessions of 8 weeks each feature 50-60 course offerings. OLLI-GMU holds 4-week winter courses and 6-week summer courses. Each session's offerings include small-group courses that are often on-going and include such topics as writing, art, and languages. Medium-size courses tend to be interactive discussion groups. The largest courses are usually lecture format, often with multiple speakers. Evaluation of program tends to be by word of mouth, though OLLI-GMU has begun looking at past programs via a course database to determine trends in such areas as frequency of course offerings, attendance, and numbers of students.

Summary of Session 3: Membership Recruitment and Retention

Panelists: Norma Hughes, Lifelong Learning Institute, NVCC
 Grace VanDerveer, Institute for Learning in Retirement, ODU
 Pat Cosslett, Osher Lifelong Learning Institute, GMU

All three panel members stressed many of the same issues confronting the participants. The following is a distillation of the points raised:

A Marketing Strategy focuses on two areas: Internal (inside the organization) and External (The "face" that the organization presents to the world).

Internal. Two sub-divisions:

1) Timely feedback to LLI Management on Quality and Content of existing classes; ideas for new classes etc., and the physical environment in which they are held (?too hot/too cold, audio adequate for hard of hearing, etc.).

2) The importance of balancing the social and academic aspects of the organization including the need to make time available for the social interaction between members. Ways to balance the academic/social element. Volunteerism. Surveys and analysis of members likes and dislikes. Understanding why members leave or renew memberships

haphazardly. Inducements including “we miss you” postcards and follow-up phone calls. Monthly social forums to provide increased member to member contact.

External. Discussion focused on the major avenues of marketing the organization:

Personal referrals (Word of Mouth etc.), continues to be the most reliable way of “spreading the word”.

The Print Media (newspapers, Senior Gazettes, flyers, mailing lists, etc).

Presentations to Senior Groups (AARP, NARFE, Senior Groups, Nursing homes etc).

Fairs/Festivals (aimed both at Seniors and at Families); emphasis on targeting and encouraging young families (e.g. 30’s or 40’s) to give LLI Memberships to their parents using “Gift Certificates”. Promoted as an Anniversary or Holiday gift to encourage (retired) parents to involve themselves in other activities.

Open Houses, using lists generated at Fairs/Festivals, Renting mailing lists targeting Seniors. The use of New Member coffee events to foster socialization with the active involvement of the Board. Monthly “Get-Together” Forums open to both members and non-members to encourage more social interaction.

Other: Be careful in the use of acronyms in both internal and external newsletters etc. Many organizations have acronyms that are similar and confusion can occur.

Television: A new area now underway on the West Coast involves the use of Cable Television to broadcast classes to those not able to attend. Also, expanded use of Web sites to inform members and prospective members of events, etc. Their web site URL is www.ollionline.tv.

Summary of Session 4: Managing an LLI Budget, Insurance and More.

Panelists: Henry Brown, Arlington Learning in Retirement Institute, GMU
Bob Bohall, Osher Lifelong Learning Institute, GMU

Brown indicated ALRI-GMU utilizes a Microsoft Access data base to track membership and income. Funds are transferred to a commercial account to pay bills for services, provide refunds, and other disbursements. Many routine expenses are paid through prepaid accounts with Arlington Public Schools and GMU. Liability insurance coverage is obtained through the State of Virginia under the VaRisk 2 Umbrella Policy that provides \$1M in coverage with a \$1K deductible. ALRI uses Quicken software in maintaining and managing three sets of accounts. Auditing is done internally without the use of outside professionals. Problems encountered include categorizing and setting up appropriate accounts consistent with the functions of ALRI. ALRI does not utilize the services of an independent auditor.

OLLI-GMU develops their budget in Oct.-Dec. prior to the start of the calendar year.

Bohall indicated salaries comprise one half the expenses. Insurance includes a general liability policy and the VaRisk coverage. Outside auditors are utilized and they prepare the Federal Tax Form 990EZ. The outside audit is expensive but helps to reassure the membership and is often a requirement for accepting donations from organizations.

OLLI-GMU has established a "Rainy Day Fund" or reserve equal to roughly one-fourth the budget to maintain financial stability. A highly successful donation program helps to cover the cost of scholarships and capital expenditures. Most contributions come from the membership. A grant has been received from the Bernard Osher Foundation that will

be utilized for major projects and future planning. Osher funds cannot be used to cover operating expenses.

OLLI-GMU has established 501(h) status in addition to 501(c) 3 nonprofit status. The 501(h) standard provides for explicit dollar limits on lobbying expenses that easily meets the needs of most organizations but clarifies a vague “non-substantial” amount terminology under section 501(c) 3. While most LLI’s will likely not undertake any significant local, state or national lobbying efforts, the 501(h) classification removes any uncertainty.

In discussion, Stewart Engel suggested that LLI’s be familiar with Chapter 139 of the Volunteer Protection Act of 1997 that limits the liability of volunteers for nonprofit organizations.

The point was made that organizations soliciting contributions need to fill out a one time registration with the Virginia Department of Consumer Affairs, Virginia Department of Agriculture.

**Conference Cohost, OLLI-GMU, summarized notes by:
Eileen Duggan**

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Mid-Atlantic Lifelong Learning Institutes Conference

The Mid-Atlantic Lifelong Learning Institutes Conference convened as a 'regional' conference of Lifelong Learning Institutes (LLIs) September 10-13, 2005. More than 160 representatives of LLIs in the US and Canada met at the Reuter Center, hosted by the North Carolina Center for Creative Retirement (NCCCR). The pre-conference schedule included nationally known and published panelists speaking on "Emerging Trends in Higher Education and the Impact on LLIs," "The Growing Gap between the Haves and Have Nots and the Role of LLIs" and "The Shifting Political Scene and Attitudes about Aging and Retirement and How These Will Impact LLIs." The theme of the conference was, "from Today's Success to Tomorrow's Promises: continuity and innovation." A panel presentation on "Strategic Planning" made extensive use of the Strengths/Weaknesses and Threats/Opportunities (SWOT) method of analysis and resulted in development of sample goals, objectives, strategies and marketing plans.

The keynote speech was delivered by Dr. Ron Manheimer, the Director of the NCCCR at the host University of North Carolina at Asheville. The speaker keyed his address to the commemorative key ring included in participants' orientation and registration materials. He explained that we each were armed with numerous keys to 'conscious aging' that could be used to open many doors. Dr. Manheimer described aging as a deliberate and controlled process in which we had the freedom to choose how we were empowered to use our keys to determine our golden years in leisurely, productive and successful aging. We would/could acquire 'new keys' from lifelong learning and self-determined or previously under-explored areas of interest such as:

holistic health, spirituality, environmental education, financial management and planning, transition processes and many other keys. In the absence of a convenient local college or university, many commercial vendors have recognized the huge market of older adult learners searching for keys to the path of meaning. Retirement communities such as Del Webb advertise their growth and learning activities as prominent keys to their popularity. Dr. Manheimer cited interesting statistics about key features of retirement planning, such as, despite claims by more than 17% of retirees that they will move to a new location upon retirement – less than 5% actually move; and that the 20% rise in undergraduate diplomas is a predictive indicator that the rank of lifelong learners will swell; and that ‘boomer’ are not joiners and volunteer less than the ‘greatest’ generation. Keys have ‘history’ and we were advised to get ‘keyed up.’

Many of the concurrent session topics centered around dealing with the recent exponential growth experienced by LLIs around the nation. For example: the NCCCR has grown from about 1200 in 2003 to over 2,000 this year accommodated by their new facility, the \$5 million Reuter Center. In Virginia, the College of William & Mary hosts the Christopher Wren Association (CWA) which recently has leapt from 1,000 to over 1,500 by ‘distributing’ its classes off-campus into local retirement communities. LLIs both large and small report growing pains and apprehension about the influx of ‘Boomers’ fundamentally changing their LLI programs. Quality program planning and development, cooperation with the host university and community, enlargement of both program offerings and facilities, use of electronic media, contributing to host universities, community service and outreach, volunteerism and economic management were popular

sessions. Many spoke to the need for a group focus, role or focal effort with which your program identifies and is recognized in your community. This common vision of a role harnesses the combined organizational and volunteered energy in a symbiotic way that targets activities and is recognized as associated with our LLIs. Another feature of this identity is a renaming or re-branding of ourselves and our organizations that separates us from the unwanted aspects of the term 'retirement' and its archaic connotations of decline and inactivity. The more inclusive "Lifelong Learning Institute (LLI)" label embraces all ages and reflects/reinforces a positive image. Some organizations have declined to rename themselves and prefer to retain their previous monikers, but that won't keep them from changing to reflect their changing population.

White House Conference on Aging (WHCOA)

Several national conferences on aging held in the 1950's were precursors to what became the first White House Conference on Aging (WHCOA) in 1961, and followed by conferences in 1971, 1981, 1995 and the next scheduled in October, 2005. The purpose of these conferences was to assess the challenges and impacts of the shifting American demographics to an aging society. These conferences generate aging issues for legislative, administrative and executive action and have resulted in Social Security amendments, policy changes in housing, health, Medicare and Medicaid, and the establishment of the Federal Administration on Aging and other agencies. The 2005 WHCOA will focus on the needs of over 76 million "baby boomers" born between 1946 and 1964. The WHCOA is authorized by Congressional amendment to the original Older Americans Act of 1965. Hundreds of preliminary regional events contribute issues and delegates to the national conference for planning future policies focused on aging.

The preliminary event in which this researcher participated occurred at the College of William and Mary in Williamsburg, VA on 14 April 2005. The strong central theme of this "Solutions Forum" was identified as "Intergenerational Connections." The able moderator was supplied by the college Center for Excellence in Aging. The discourse was centered on three panels of expertise in the field of aging. The first panel discussed economic security under the title, "Planning Along the Lifespan." Some economic solutions suggested here include a tax credit for those children who provide long term (informal) care for their parents and making insurance more affordable for all. Informal care is estimated to be as much as 200 BILLION dollars of annual cost

avoidance for elder care in America. The second panel explored healthy aging and livable communities in the context, “Our Community.” The second panel cited the #1 problem for households with elderly is a communication problem in identifying and accessing services via an efficient entry point and centralized services. The “Senior Navigator” website was repeatedly recommended. This third and final panel anticipates a “Silver Tsunami” shortage of some 200,000 doctors, nurses and medical specialists in aging and those who train them (faculty shortages are already apparent now). The third panel addressed programs for “Social Engagement” represented by lifelong learners, undergraduates interacting with community seniors, and “Faith in Action.” This panel described learning in retirement as a community outreach of self-defined interest groups sharing and socializing via mental exercise. An undergraduate student who reads to the elderly and infirm recommends it as a local solution for generational interaction whereby they ‘humanize each other as people at different stages of a journey.’ The “Faith in Action” representative regards their services to frail seniors and others as simple neighborly acts and suggests diversity and incentives for volunteerism, short term commitments, and database management for scheduling.

The final panel was followed by an ‘open mike’ session which was video taped to capture the issues speakers brought to this regional event and included in the national event later this year. A representative assortment of comments includes:

- ❖ Citizens need to be educated about ‘retirement planning’ while they are young in order to achieve the desired results...not educated later when it is more costly and they are less able to change their outcomes.

- ❖ Some suggest that younger generations are unfairly burdened by taxes and perhaps the time has come for an “income test” or other needs criteria for eligibility for social security benefits.
- ❖ Medicare/Medicaid/SSA benefits should NOT be reduced...
- ❖ Dietary education and research is a special need for the aging.
- ❖ Need for support for the Lifelong Learning Institutes across the state.
- ❖ How can the growing aging population be tapped as an asset?
- ❖ Need help in identifying lower cost prescription drugs from ‘safe’ sources.
 - much money is wasted on drug advertising

The conference concluded with hopeful expectations for the national event, the White House Conference on Aging in December 2005 in Washington, DC (by invitation or appointment as a delegate).

On a lighter note, the speaker observed, **“Inside every older person is a younger person wondering, what the hell happened?”**

(Cora Harvey Armstrong)

and ...

“Beautiful young people are acts of nature.

Beautiful old people are works of art.”

(Eleanor Roosevelt)

VITA

Dianne Quinn Kurec was born on July 5, 1952 in Buffalo, New York and is an American citizen. She graduated from South Park High School, Buffalo, New York in 1970. She received her Bachelor of Individualized Studies from Virginia State University at Petersburg, Virginia in 1992. Dianne obtained her Master of Science in Administration degree from Central Michigan University, Mount Pleasant, Michigan in 1994. She served over 26 years in the United States Army and the Army Reserves in logistics, training and teaching. Dianne is a 1991 graduate and certified post-graduate instructor of the Army's Command and General Staff Officer's College of Fort Leavenworth, Kansas and taught post-graduate leadership education and development. She has served curriculum development and gifted education committees in Chesterfield County Public Schools. Dianne is pleased to be a member of the Christopher Wren Association at the College of William and Mary in Williamsburg. Mrs. Kurec has over 30 years federal service and has continued to serve as a civilian employee of the Army, the Navy, and the Joint Forces Command, Joint Experimentation Laboratory, which is headquartered in Norfolk, Virginia.